



BEST PRACTICES FOR ENTERPRISE GAMIFICATION PROJECT MANAGEMENT

From start to finish – everything you need to know about
implementing an enterprise gamification project –
within 2-5 weeks

A whitepaper by

game_{ff}fective

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1. Introduction

You're ready to make the leap and begin an Enterprise Gamification project. Whether for e-learning, training, customer service or sales, you're convinced that gamification will do your business a whole lot of good. It will.

Yet you are unsure of what the process includes, how long it would take and what the results would look like. Managing the project effort required to implement enterprise gamification will determine its success.

We've written a guide to take you through the process and project plan, sharing our checklists, enterprise gamification project charts, to-do lists and more. Gamification is an ongoing process – circumstances change and iterations in game elements and game rules make for better outcomes. Managing the implementation project will pay off, since carefully managing the many activities prior to launch will ensure the project will be up and running within weeks and not months.

This document also consolidates best practices in ensuring your gamification project is successful – from communicating the project's goals at the outset, to doing a dry run to make sure your gamification implementation makes sense, to measuring gamification ROI when the project is done.

2. Setting out the Business case

Clearly stating the business case for enterprise gamification is a great practice to begin with.

There is no doubt that enterprise gamification is a beneficial project for most companies and that it can create sustainable change across many productivity metrics. However, this doesn't mean that you can skip the need to make a (business or other) case for the project. Defining the business case not only helps in justifying the expense and energy associated with the project but also the measurement of its results afterwards.

Creating the business case requires addressing each of the items below. If you do so, your business case will be complete.

2.1. Goal definition

When you set out to define the goals of the enterprise gamification project, answer the following questions:

- What is the project set to achieve? By when?
- What are the behavioral changes that should be promoted?
- Are there additional elements that should be balanced into the equation?

Here's an example: an enterprise gamification project is planned for a customer service center. The stated goal is to improve customer satisfaction ratings. The desired change in customer representative behavior is to have them focus on problem resolution. However, there are additional elements that should be balanced into the equation, as customer service reps should still strive to keep calls fairly brief, so that wait times at the center won't increase exponentially.

To reflect the goals, we suggest creating a brief project statement as follows: "I want to [state goal] in the next [state time] by [doing what] without hurting [additional elements that need to be balanced]"

Here are real-life examples of project statements:

- An Enterprise Gamification project for sales: "I want to increase lead generation activities in the next 30 days by 10%, by motivating my marketing team without reducing contract renewal efforts"
- An Enterprise Gamification learnification project: "I want to improve the quality of employee training in the next 60 days by driving new hires to complete more coursework during their on-boarding process"
- An Enterprise Gamification knowledge collaboration project: "I want to grow quality knowledge collaboration entries by 15% in the next 90 days by motivating employees to contribute to the system without distracting them from their daily duties"
- An Enterprise Gamification customer service project: "I want to improve customer service satisfaction without growing call times within the next month by rewarding employees for quality metrics, growing our core KPIs by 5%"

When stating a goal, do not worry about using a non-simplistic statement – don't just say "increase sales calls" but, when possible, include qualitative and quantitative goals. Measurable goals such as CSAT, AHT (Average Handle Time) and conversion rates (in a call center example) should be clearly stated.

2.2. State the benefits

Once you've defined the project goal, state the benefits: better trained employees that are more knowledgeable about their work; more leads for sales teams etc. This will help you define the project's KPIs.

2.3. Choose your KPIs

Choose the KPIs you'll measure during the process. These are very important on multiple levels. First of all, by clearly stating the KPIs and measuring them before the gamification project, you have your "control group" – or, to be more precise, the state of affairs as it was before gamification.

Additionally, KPIs are important in defining the game rules and, more importantly, in communicating to employees what the corporate goals are. A gamification project is an excellent opportunity [to communicate corporate goals to employees](#) and to align them with those goals, similar to the use of Corporate Performance Measurement systems for management. Finally, KPIs will help you assign a monetary value to the project and measure its ROI.

You can also try to set an improvement goal, stated as a percentage – where you'd like to improve a certain KPI by a certain percent, as such 10-20% more.

In this respect it is important to create a distinction between process KPIs and performance KPIs. A process KPI is a behavior you'd like to change. For instance, increase quality reporting into the CRM system, which can, in turn, enable you to make better quality sales forecasts. A performance KPI can be the result of a process KPI (but not necessarily) – more sales.

Similarly, pay attention to the difference between KSFs (Key Success Factors) and KPIs – key success factors will influence the outcome of the project, while KPIs are how you measure it.

2.4. State your stakeholders

List all stakeholders in the process: human resources, business unit management, IT, key employees and more. Make sure they are aware of the process; plan how to effectively communicate the enterprise gamification project with project stakeholders.

2.5. Plan and budget

Last but not least, plan and budget the project. The next sections of this white paper will take you through this process in detail.

3. Project Overview

To give you a good sense of the project phases of an enterprise gamification project, we've decided to share our own project plans and charts. You can use them as a reference point for any gamification project you choose to implement, since it outlines the main phases in implementing a gamification project.

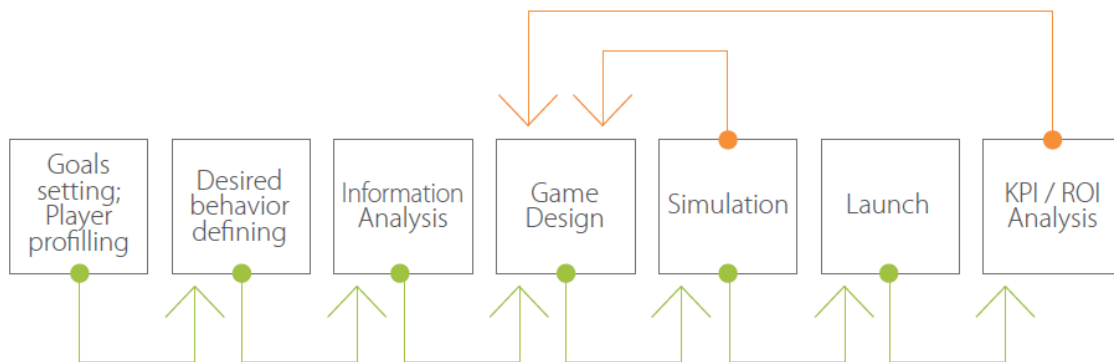
The typical project, from beginning to actual launch should take 2-5 weeks, depending on the complexity of the process.

This assumes that the gamification platform chosen is a no-code platform that can simply integrate across many enterprise systems. When choosing a gamification vendor, make sure you understand whether the IT integration effort risks lengthening the project or making it cumbersome, especially when the gamification project spans more than one enterprise system, meaning that employees will use it in the context of several enterprise applications.

The main enterprise gamification project phases are (1) preparation (2) design (3) integration & setup and (4) testing and calibration.

The diagram below shows the main project components:

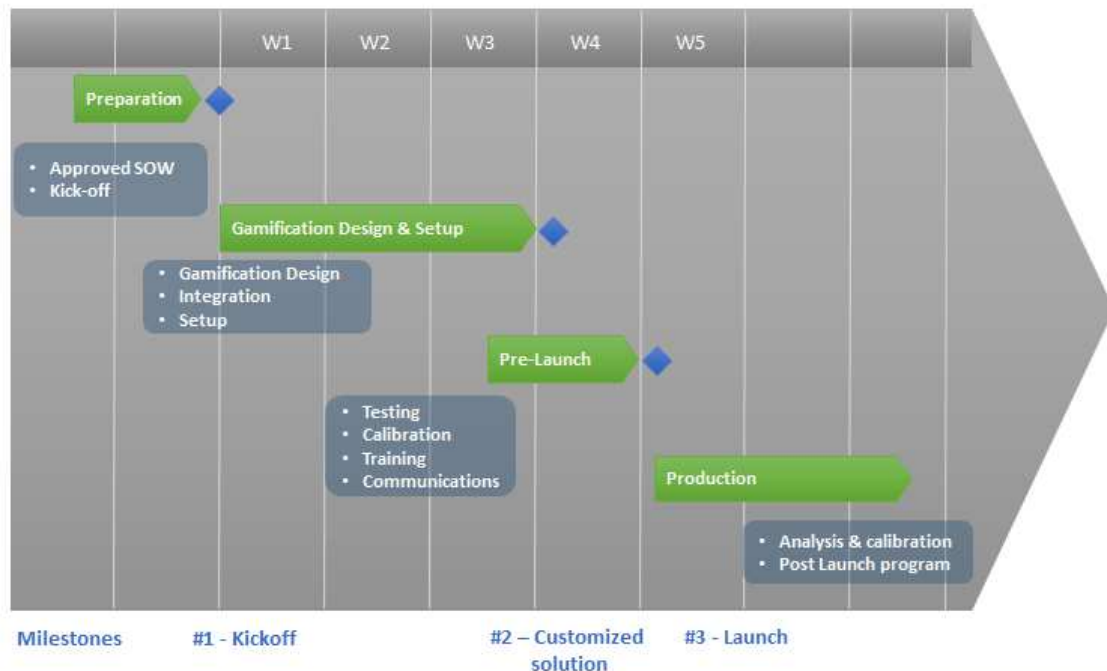
- The preparation phase includes goal setting, player profiling, definition of desired behaviors and information analysis.
- The game design phase is where game elements and rules are set.
- The integration and set up phases include simulations, which, in turn, may lead to changes in game design.
- Testing and calibration extend from the launch phase and into the KPI and ROI analysis activities



Note that the green arrows show the chronological progression from one phase to another. Yet, the orange arrows show that enterprise gamification projects are always iterative in nature: information from the simulation and KPI and ROI analysis is re-worked into the game design, allowing for changes in the game design after the launch phase.

We'll go over the details for each of the phases in a short while, but there is one key takeaway from the chart below: **Gamification is an iterative process – while it requires planning, good game design practices and solid business discovery – gamification projects always need calibration.**

Here's a more detailed project plan, but still high level. You can email us to request a set of slides with a fuller plan.



As you can see, most of the process is about business discovery and goal setting, covered in the preparation and design phases. Actual integration with enterprise systems should not take long. What takes time is the thought process about corporate and gamification goals before integration and after the initial process is set-up.

4. The Preparation Phase

To successfully implement an enterprise gamification project, you must invest in a clear and detailed work plan. A plan will help you to communicate with everyone, do things in the right order, identify key resources and be able to meet your deadlines.

4.1. Kicking off and role definition

Begin with a kickoff meeting with key stakeholders. The goals of the meeting are to define high level objectives as well as time schedule, distribute roles and

responsibilities, allocate resources, etc. Gamification expectations vary greatly. Manage those expectations.

Once you'd kicked off the process, make sure that you've built the right team. It is important to cover the following key roles (depending on the size of your organization, the same person can cover more than one role):

- An executive sponsor to lend their authority and influence to the process
- A project owner to lead the implementation and be the contact to the team of the gamification vendor
- An administrator to manage the Gamification platform on a day to day basis

4.2. Business Discovery

This phase, when done well, ensures that the game design process has, as its inputs, a thorough understanding of your business and its needs. This process makes use of interviews and questionnaires.

The output of the business discovery process is the following:

- Player Characterization – Identify each employee types/segments according to age, gender, education, skills as well as behavioral characteristics such as motivators (money, recognition, other?) service orientation, competitive or cooperative, etc.
- Goal setting – What are the goals you want to accomplish in the broader sense, the desired behaviors the organization wishes to encourage, habits the organization wants to build, and product knowledge to be imparted?
- Roles and functions – Describe the roles in the teams which are undergoing the process (e.g. sales representatives, supervisors, regional directors etc.); as well as how are representative achievements measured and what is the percentage of employees that climb the corporate ladder.
- Incentives / motivators – Which employee rewards are given today? What kind of rewards are to be handed out: monetary or non-material, at what frequency, are rewards personal or team-oriented and other related questions.
- KPIs – What are the KPIs you want to measure? Examples: use of a certain tool; daily / weekly / monthly closed deals; percentage compliance with quota.
- Objectives, and Key Success Factors (KSF) – specific business objectives such as increasing sales, meeting the sales quota, increasing the number of closed deals, high quality leads, high quality knowledgebase and so on.
- Risk mitigation plan – how will the organization handle failed communication, problems with data accuracy, cynicism, lack of usage, etc.

5. Game Design

This phase is the core element, yet we won't discuss game design specifically, since that deserves a book of its own. We'll just say that there are many game elements and that they should be applied correctly to the goals of the enterprise gamification project at hand.

After the desired behaviors and the employee segmentation are complete, you need to address the game mechanics (or game elements) used to transform behavior.

- Will you choose a narrative-based gamification theme? Go with the more traditional points and leaderboards?
- What process will gamification cover? The use of one application, or business processes that traverse several applications?
- Will the game cover team goals or will it set personal goals as well? How are the game rules calculated?
- Are the goals common for all employees, or are they different for each segment?
- Is the game made to drive a sense of competition, completion or measurement? (for more information about this topic, [go here](#).)
- Will the game be a recurring game, played on a weekly or daily basis?
- How will activities be measured? Will rewards be used? How?

6. Integration and Setup

This phase is preceded by Information and Technology Discovery which includes:

- Source systems
- Data objects
- Calculation rules
- Quality & Reliability
- Update frequency
- Systems workload
- Interfaces architecture
- Scheduling
- Data quality assurance
- Security
- Console Configuration

In many enterprise gamification scenarios, this phase requires thinking about how measures from several systems are joined together to give employees clear calls to action, linking the employee's work flow to the right system based on information from another.

7. Simulation and Launch

Once the system is ready, you can begin running a simulation, based on past data. We recommend doing this dry run with based on historical data based on several months/weeks. For instance, let's say you want to create a sales leaderboard. Run the gamification system with its rules on the historical data. You'll produce a leaderboard. Check that leaderboard against managers' gut feel. Let's say that they all guessed that Jack and Jill will be at the top of the leaderboard. If the dry run has an altogether different result – placing Jack and Jill way down the list – maybe the rules or settings need to change...

When launching, make sure to introduce the system to employees using several methods – from emails to brief video demos. We recommend having a weekly communication event related to the project – a gamification calendar – with each “event” promoting a different behavior or metric.

Take care to proactively address any concerns the employees may have over their compensation, how their gamification performance will affect their standing and more. Demonstrate how gamification ties in with corporate goals – such as customer satisfaction or knowledge management.

In games that are repeated, such as league games, make sure that the terms of the game are well explained.

8. Iterate iterate iterate

Once the project is live – begin measuring its results. Make sure to define, before launch, what would success be, both qualitatively and quantitatively. Define what you'll measure – activities, courses completed, customers contacted etc.

Measure results – analyze them and make changes. Often, the project hits its stride after the first iteration, not immediately. That's normal – we're changing behaviors and they sometimes change in surprising ways with unforeseen consequences.

Take iteration into account when planning any gamification process – from the simple leaderboard to the intricate narrative based gamification. Even very successful gamification projects, that sustainably increased KPIs by 20-30% over a long period of time, took some calibration to get things right. Use this understanding to manage expectations about the project results.

In case you find this statement disagreeable, think about it this way: would you launch a new corporate website without some basic A/B testing and without iterating design, calls-to-action and messages? Would you launch a mobile app that is important to your

business without recalibrating the user interface and the user experience? You would not.

Think about gamification as the user interface to your enterprise systems – your employees' user interface, complete with calls to action, emphases and game mechanics that are all about affecting how employees interface with your organization and your systems.

Here are some examples of the iterative process: in a learnification project, quizzes can be implemented to encourage employees to go over their coursework in depth. If the KPIs show that employees were overly stressed about the quizzes, or that their immersion in coursework caused them to miss other subjects, the game design of the learnification project can be altered. Similarly, an emphasis in game design on customer satisfaction can lead to other lower productivity levels in a call center and the game design should change accordingly. Sometimes these changes are made evident during the game simulation phase, and sometime later on in the process.

9. Measure Enterprise Gamification ROI

Being able to present a clear Return on Investment (ROI) is great tool to ensure future engagement of management in additional gamification projects.

If you've followed the steps so far, calculating ROI shouldn't be difficult.

- To calculate the return - take the KPI results from a control group or from the period prior to the gamification launch. Compare them to the results after the project implementation. Assign a monetary value to the improvement. This is your return. For non-monetary goals, such as customer satisfaction, try to agree beforehand, during the business case definition phase, on their value. Ask the organization what the value of increased customer satisfaction or better knowledge collaboration is. Record it.
For instance, if leads generated grew by 10%, if you assign a monetary value for each lead, you can actually calculate the business value.
- Take time into account: if you expect the return to last 12 months, make sure you reflect the projected 12 month gain and not the gain at the time of measurement.
- Calculating the investment is even simpler: what are the costs expended by the organization to carry out the project?
- Divide Return by Investment – and this is your ROI.

10. Summary

Enterprise gamification is becoming an important part of business for many enterprises, the new UX for enterprise applications. Managing the process of its implementation can increase the ROI on any enterprise gamification project since with proper planning and KPI tracking the project will yield results faster and with lower costs.