

Project Charter

Project Name: Badgeville Gamification Pilot Project
Department: HR Technology
Focus Area: @Shield
Product or Process: Badgeville Gamification Pilot

Prepared By:

Document Owner	Project or Organization Role
Candida Rodriguez-Lee	Product Consultant
Frieda Orłowski	Project Manager

Version	Date	Author	Change Description

1. Project Purpose and Description

Project Purpose
Purpose of the pilot is to demonstrate that Badgeville can move employees from how to use the tool (level 1+) - to optimizing @shield as a tool (level 3+), becoming more productive and engaged employees.
Background and Needs Analysis
BSC is currently in the process of cultural change. These changes include a need for adoption of the @Shield Jive instance and other adoption needs concurrent with cultural and other business changes.
<ul style="list-style-type: none">• BSC is pursuing a Great Place to Work distinction• BSC needs to uphold and promote BSC cultural values• BSC needs @Shield adopted and matured enterprise wide• BSC seeks to maintain market currency

Project Objectives

The following are within the scope of this project plan:

- Corporate-wide support of the gamification initiative.
- Strategic design and development plan for engaging the workforce in @Shield for conducting BSC business.
- Incorporate BSC Values and culture change goals.
- Metrics provided by the vendor that guide gamification development for behavior changes.
- Metrics indicating successful adoption and maturity of @Shield.
- Successful launch of gamification pilot.

Project Goals

@Shield Goals

The following goals are central to the gamification pilot:

- increase knowledge management of @shield
- increase engagement and collaboration in @shield
- improve BSC on-boarding process through @shield

Blue Shield Values and Culture Goals

Integrated into the pilot are the bolded values aligned to the project:

- **Trusted and Trusting**
- **Valuing People**
- **Results-Oriented**
- **Interconnected**
- **Creative Solutioning**
- Mission Committed
- **Agile and Nimble**
- **Customer-Centric**

2. Project Scope

Project Scope Statement	
This gamification pilot is to provide for a baseline of success in resolving two main business needs. One is the adoption and maturing of @Shield usage. The other is to provide a vehicle for the promotion of the BSC Values and new culture including the Great Place to Work initiatives enterprise-wide. The pilot's success will determine continued engagement in gamification missions development.	
Project Scope Is (Includes):	Project Scope Is Not (Does Not Include):
Enterprise support of Gamification	Any other enterprise social business platforms in use today
@Shield adoption and maturation of usage	Any other API besides JIVE and Badgeville
Employee engagement goals	Additional missions other than the initial missions agreed upon
BSC Values and culture adoption within the @Shield gamification pilot	
Development of metrics for measuring usage and cultural engagement	

3. PROJECT SUCCESS FACTORS

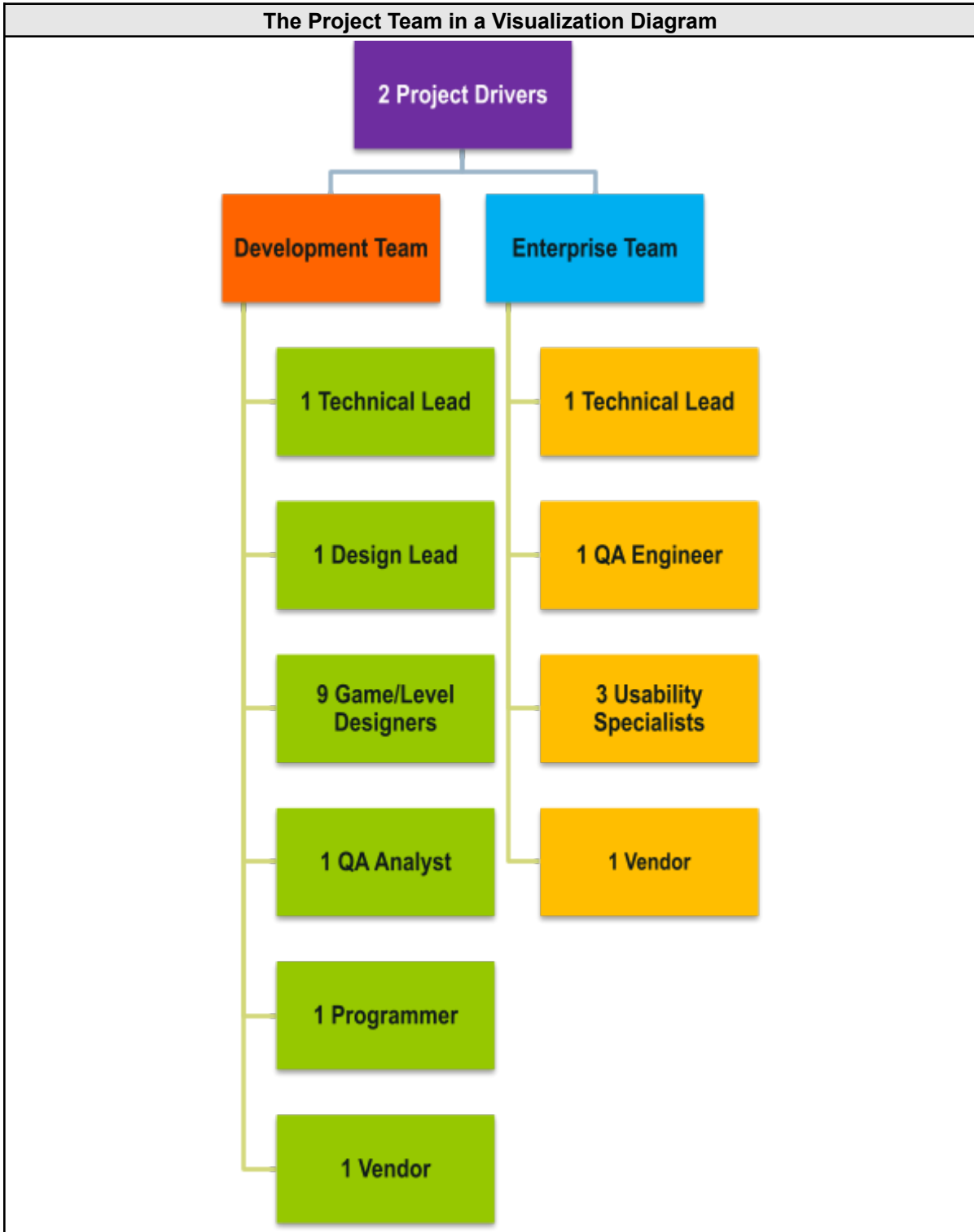
Project Critical Success Factors
<p>Success Factors include:</p> <ul style="list-style-type: none"> ● Business Objectives- Accurately define and link the SMART goals and objectives. ● Player Objectives- Consider the type of players you are engaging. The Players Objectives/Business Objectives must Overlap. (Sweet Spot) Amy Jo Kim diagram. ● Keeping it interesting and rewarding- fun motivates people. Pleasure Motivation diagram. Motivation is the single most important factor in learning. ● Motivation- Tap into intrinsic as well as extrinsic Motivators, don't make it all about PBLs. Create surveys. Observe, interview to isolate player motivators. ● Fairness- Keep track of what players are doing/ fairness/ getting off track/ declining engagement. ● Player Journey (Shield Map)- Provide players with a personalized story, give them missions and quests. ● Engagement - Get players to help each other learn; don't forget to design for socializers. ● Training - Gamification is good for training in repeatable boring tasks, collaborative tasks, compliance training. ● Make the gamification actionable steps in the larger business goal. Use the action behaviors to modify corporate behaviors, game design, content and offerings. ● Integrate gamification into social, mobile, online and offline campaigns. ● Promote social referral programs. Reward referrals. ● Ensure API security. ● Open API for customization. ● Create customizable gadgets for users. ● Add additional rewards or leveling to particularly difficult engagement features. Ex. get an extra 100 pts if you watch this, level up with this additional activity.
Project Strategy
<ul style="list-style-type: none"> ● Align missions with structured training (see Training Project): <ul style="list-style-type: none"> ○ In alignment with the eLibrary, use those level training to be missions

Project Charter

<ul style="list-style-type: none">○ see how successful it is● Work with Frieda and CMs to gather specific outcomes for each area● Set all mission before turning on the pilot● Missions would be prerequisite based, so you have to complete level 1 to get to the level 2 badges, and so forth● Will add in badges already owned, such as Wellvolution badges, Cares, etc.● Ongoing campaigns and alignment of company initiatives in partnership with internal communication strategies.● Short time only missions and campaigns.● Design for leadership missions.
Communications Strategy
<ul style="list-style-type: none">● First communication from CM to group, explaining what the pilot is and what it entails● Initial agreement to participate and baseline survey (without this completed, they will not be able to participate) *Can we do pilot to limited group or enterprise (if enterprise we will do baseline, but not initial agreement.● Based upon analysis, push communications to groups on leader boards, where they are compared, what's coming up, etc. (brainstorm more on this) through-out the pilot.● Pilot end survey.
Beginning Assumptions
<ul style="list-style-type: none">● Current user population is at a low percentage of adoption.● Employee base has X% understanding of company initiatives.● Employee base has X% understanding of BSC Values.
Known Constraints
<ul style="list-style-type: none">● Employees don't have time to use @Shield.● Small percentages believe @Shield is Facebook.● User base has low tech knowledge.● Company is in a climate of continuous change leading to an influx of new users.
Key Interim Products
<ul style="list-style-type: none">● Sign contract with vendor● Receive enablement document from vendor● Receive testimonials and metrics examples from vendor● Complete the Success Factors Checklist prior to QA and Testing

4. Gamification Pilot Team

The Project Team



Project Team Roles

* See Team Structure Matrix for details on responsibilities.

	Name	BSC Role	Project Role
1	Candida Rodriguez	Project Lead, HRIS Senior	Producer/Technical Lead, Programmer, QA Engineer, Usability Specialist
2	Marina Kruk	@shield Manager, Technical PM	Project Driver
3	Gabe Bruck	Analytics	QA Analyst, QA Engineer, Usability Specialist
4	Stephanie Christen	Communications Specialist	Game Designer, Level Designer
5	Erika Gamarra	Instructional Systems Design Consultant	Game Designer, Level Designer
6	Frieda Orlowski	Instructional Systems Design Consultant	Design Lead, Game Designer, Level Designer, Usability Specialist
7	Emily Elias	Performance & Learning, CM	Game Designer, Level Designer
8	Christopher Gilland	Performance & Learning, CM	Game Designer, Level Designer
9	Jenifer Porter	Community Manager, Provider Relations	Game Designer, Level Designer
10	Carrie Rasmussen	Community Manager, I&M	Game Designer, Level Designer
11	Sheila Pember	Community Manager, Customer Quality	Game Designer, Level Designer
12	Lori Sufficool	Community Manager, Customer Quality	Game Designer, Level Designer
13	Grace Prasad	Communications Lead, HR	Game Designer, Level Designer
14	Badgeville	Vendor	Vendor, Producers, Behavior Analysts, Programmers

KEY:

A – Accountable for successful completion of task.

R – Responsible for completion of task. (Task can be delegated to this person.)

S – Supports task.

C – Requires communication about the task.

Organization Title	Project Activity				
	Initiation Phase	Analysis	Design	Testing	Closure
Technical Lead, Programmer	S	A	S	A	C
Design Lead	A	R	A	S	C
Game/Level Designers	C	C	S	C	C
QA Analyst, QA Engineer	C	A	S	A	C
Usability Specialists	S	S	S	A	C
Project Drivers	A	A	A	A	A
Vendor	C	C	C	C	C

5. Work Breakdown Structure, Activities List and Schedule



Project Charter

Project Plan

Task Name	Duration	Start	Finish
Project Plan for Gamification Pilot	45 days	Tue 6/1/04	Sat 7/31/04
Initiation Phase	5 days	Tue 6/1/04	Mon 6/7/04
Develop Pilot Project Charter	2 days	Tue 6/1/04	Wed 6/2/04
Analyze requirements	2 days	Tue 6/1/04	Wed 6/2/04
Create requirements document	2 days	Tue 6/1/04	Wed 6/2/04
Document project charter	2 days	Tue 6/1/04	Wed 6/2/04
Develop Pilot Project Scope	1 day	Thu 6/3/04	Thu 6/3/04
WBS	1 day	Thu 6/3/04	Thu 6/3/04
Resource allocation	1 day	Thu 6/3/04	Thu 6/3/04
Develop Pilot Project Plan	2 days	Fri 6/4/04	Mon 6/7/04
Create project plan	2 days	Fri 6/4/04	Mon 6/7/04
Identify project dates	2 days	Fri 6/4/04	Mon 6/7/04
Identify project resource requirements	2 days	Fri 6/4/04	Mon 6/7/04
Project Charter, Project Scope and Project Plan Approval	0 days	Mon 6/7/04	Mon 6/7/04
Initiation Phase Approval	0 days	Mon 6/7/04	Mon 6/7/04
Analysis Phase	10 days	Tue 6/8/04	Mon 6/21/04
Analyze Business Objectives	5 days	Tue 6/8/04	Mon 6/14/04
Identify Business Objectives	1 day	Tue 6/8/04	Tue 6/8/04
Identify business objectives for Gamification	1 day	Tue 6/8/04	Tue 6/8/04
Determine Business Goals	1 day	Tue 6/8/04	Tue 6/8/04
Create business goals lists for each of the business objectives	1 day	Tue 6/8/04	Tue 6/8/04
Determine Target Behaviors	3 days	Tue 6/8/04	Thu 6/10/04
Create list of valued behaviors based on business goals	3 days	Tue 6/8/04	Thu 6/10/04
Analyze Player Objectives	5 days	Tue 6/15/04	Mon 6/21/04
Analyze Player Objectives and Motivators	3 days	Tue 6/15/04	Thu 6/17/04
Gather existing demographics on players	3 days	Tue 6/15/04	Thu 6/17/04
Create surveys for player psychographics	3 days	Tue 6/15/04	Thu 6/17/04
Deliver surveys	3 days	Tue 6/15/04	Thu 6/17/04
Gather data	3 days	Tue 6/15/04	Thu 6/17/04
Analyze: Make determinations about player types and motivations	3 days	Tue 6/15/04	Thu 6/17/04
Link Business and Player Objectives	2 days	Tue 6/15/04	Wed 6/16/04
Determine overlap	2 days	Tue 6/15/04	Wed 6/16/04
Narrow objectives that don't overlap	2 days	Tue 6/15/04	Wed 6/16/04
Determine Success Metrics	10 days	Mon 6/7/04	Fri 6/18/04
Define success metrics based on selected objectives alignment	10 days	Mon 6/7/04	Fri 6/18/04
Obtain Metrics from Vendor	10 days	Mon 6/7/04	Fri 6/18/04
Analyze Phase Complete	0 days	Mon 6/21/04	Mon 6/21/04
Initiation Phase Approval	0 days	Mon 6/21/04	Mon 6/21/04
Design Phase	15 days	Tue 6/22/04	Mon 7/12/04
Determine Game Framework	5 days	Tue 6/22/04	Mon 6/28/04
Conduct brainstorming sessions	5 days	Tue 6/22/04	Mon 6/28/04
Identify game engagement, themes, archtypes, and game economy	5 days	Tue 6/22/04	Mon 6/28/04
Determine engagement elements	5 days	Tue 6/22/04	Mon 6/28/04
Determine Engagement continuum elements for player types	5 days	Tue 6/22/04	Mon 6/28/04
Determine fun elements for player types	5 days	Tue 6/22/04	Mon 6/28/04
Determine Intrinsic motivators for player types	5 days	Tue 6/22/04	Mon 6/28/04
Determine extrinsic motivators for player types	5 days	Tue 6/22/04	Mon 6/28/04
Determine Themes and Player Archtypes	5 days	Tue 6/22/04	Mon 6/28/04
Determine Game Themes for Player Types	5 days	Tue 6/22/04	Mon 6/28/04
Determine Player Archtypes for Player Types	5 days	Tue 6/22/04	Mon 6/28/04

Project Charter

Determine Game Economy	5 days	Tue 6/22/04	Mon 6/28/04
Determine Game Economy for player types	5 days	Tue 6/22/04	Mon 6/28/04

Project Charter

Determine PBLs	4 days	Tue 6/29/04	Fri 7/2/04
Determine Points for player types	5 days	Tue 6/29/04	Mon 7/5/04
Determine Badges for player types	5 days	Tue 6/29/04	Mon 7/5/04
Determine Leaderboards for player types	5 days	Tue 6/29/04	Mon 7/5/04
Determine Leveling	2 days	Tue 7/6/04	Wed 7/7/04
Determine leveling for newbies	2 days	Tue 7/6/04	Wed 7/7/04
Determine leveling for apprentice	2 days	Tue 7/6/04	Wed 7/7/04
Determine leveling for wizards	2 days	Tue 7/6/04	Wed 7/7/04
Checklist of Success Factors	1 day	Thu 7/8/04	Thu 7/8/04
Walkthrough checklist of success factors	1 day	Thu 7/8/04	Thu 7/8/04
Develop Design and Development Plan	2 days	Fri 7/9/04	Mon 7/12/04
Compile all team brainstorming results into a plan	2 days	Fri 7/9/04	Mon 7/12/04
Write the Design and Development Plan	2 days	Fri 7/9/04	Mon 7/12/04
Project Design and Development Approval	0 days	Tue 7/13/04	Tue 7/13/04
Design And Development Phase Approval	0 days	Tue 7/13/04	Tue 7/13/04
QA and Testing Phase	10 days	Tue 7/13/04	Mon 7/26/04
Quality Assurance and Control Plan	10 days	Tue 7/13/04	Mon 7/26/04
QA and Playtesting	5 days	Tue 7/13/04	Mon 7/19/04
QA and Playtesting plan	5 days	Tue 7/13/04	Mon 7/19/04
Conduct QA and Playtesting	5 days	Tue 7/13/04	Mon 7/19/04
List bugs	5 days	Tue 7/13/04	Mon 7/19/04
Repair bugs	5 days	Tue 7/13/04	Mon 7/19/04
Usability Testing	5 days	Tue 7/13/04	Mon 7/19/04
Usability plan	5 days	Tue 7/13/04	Mon 7/19/04
Conduct Usability testing	5 days	Tue 7/13/04	Mon 7/19/04
List bugs	5 days	Tue 7/13/04	Mon 7/19/04
Repair bugs	5 days	Tue 7/13/04	Mon 7/19/04
Metrics and Behavior Gaps	2 days	Thu 7/15/04	Fri 7/16/04
Obtain Metrics from Vendor	2 days	Thu 7/15/04	Fri 7/16/04
Identify behavior gaps using metrics	2 days	Thu 7/15/04	Fri 7/16/04
Resolution of Behavior Gaps	3 days	Fri 7/16/04	Tue 7/20/04
Create Resolution Plan	3 days	Fri 7/16/04	Tue 7/20/04
Implement gap resolution	3 days	Fri 7/16/04	Tue 7/20/04
Conduct final testing	3 days	Fri 7/16/04	Tue 7/20/04
Approval for Launch	0 days	Tue 7/20/04	Tue 7/20/04
Launch Pilot	5 days	Tue 7/20/04	Mon 7/26/04
Monitor Pilot Launch	5 days	Tue 7/20/04	Mon 7/26/04
Create issues list	5 days	Tue 7/20/04	Mon 7/26/04
Repair bugs	5 days	Tue 7/20/04	Mon 7/26/04
Obtain Metrics from Vendor	5 days	Tue 7/20/04	Mon 7/26/04
QA And Testing Phase Approval	0 days	Tue 7/27/04	Tue 7/27/04
Closeout Phase	2 days	Tue 7/27/04	Wed 7/28/04
Contract Closeout	1 day	Tue 7/27/04	Tue 7/27/04
Launch project "Lessons Learned" review	1 day	Tue 7/27/04	Tue 7/27/04
Establish process for archiving project data	1 day	Tue 7/27/04	Tue 7/27/04
Archive documents	1 day	Tue 7/27/04	Tue 7/27/04
Conduct administrative closeout	1 day	Tue 7/27/04	Tue 7/27/04
Closeout Phase Approval	0 days	Wed 7/28/04	Wed 7/28/04

Project Charter

Milestones

Task Name	Duration	Start	Finish
Project Plan for Gamification Pilot	45 days	Tue 6/1/04	Sat 7/31/04
Initiation Phase	5 days	Tue 6/1/04	Mon 6/7/04
Initiation Phase Approval	0 days	Mon 6/7/04	Mon 6/7/04
Analysis Phase	10 days	Tue 6/8/04	Mon 6/21/04
Analyze Phase Complete	0 days	Mon 6/21/04	Mon 6/21/04
Initiation Phase Approval	0 days	Mon 6/21/04	Mon 6/21/04
Design Phase	15 days	Tue 6/22/04	Mon 7/12/04
Develop Design and Development Plan	2 days	Fri 7/9/04	Mon 7/12/04
Project Design and Development Approval	0 days	Tue 7/13/04	Tue 7/13/04
Design Phase Approval	0 days	Tue 7/13/04	Tue 7/13/04
QA and Testing Phase	10 days	Tue 7/13/04	Mon 7/26/04
Approval for Launch	0 days	Tue 7/20/04	Tue 7/20/04
QA And Testing Phase Approval	0 days	Tue 7/27/04	Tue 7/27/04
Closeout Phase	2 days	Tue 7/27/04	Wed 7/28/04
Closeout Phase Approval	0 days	Wed 7/28/04	Wed 7/28/04

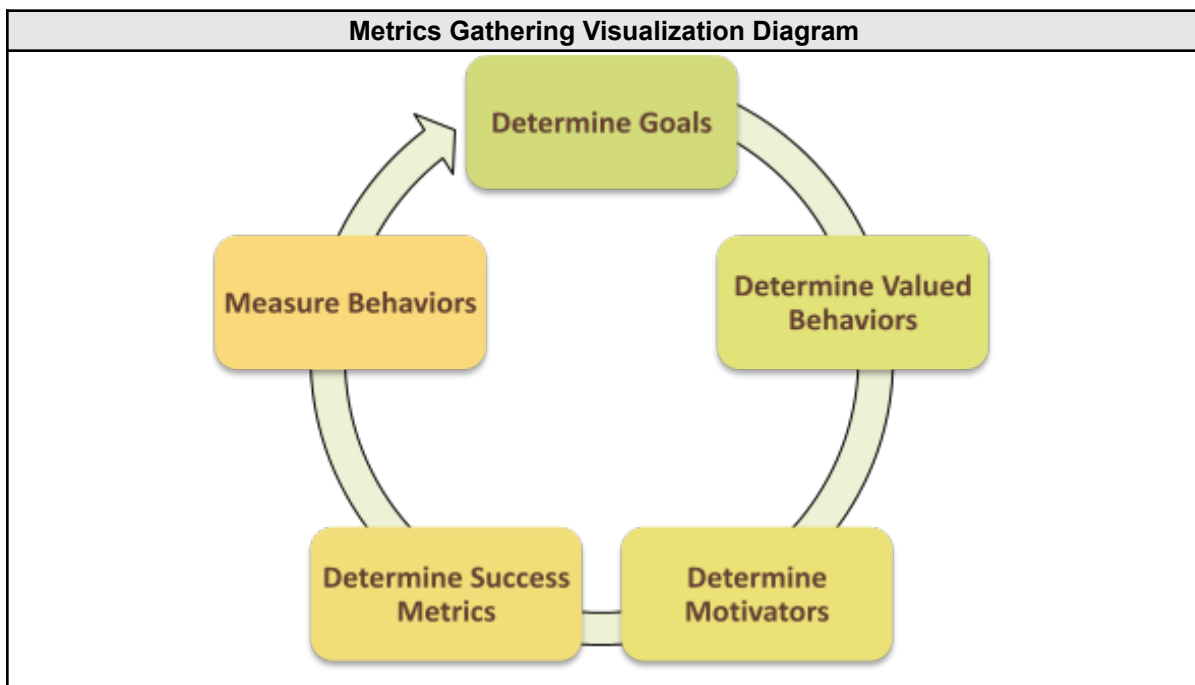
Project Deliverables, Owners & Dates

1	Initiation Phase	Owner	Date
1.1	Project Charter	Candida Rodriguez and Frieda Orłowski	6/7/13
1.2	WBS & Resources	Candida Rodriguez and Frieda Orłowski	6/7/13
1.3	Timeline	Candida Rodriguez and Frieda Orłowski	6/7/13
1.4	Project Plan	Candida Rodriguez and Frieda Orłowski	6/7/13
2	Analysis Phase	Owner	Date
2.1	Business Objectives Analysis Documentation (e-data)	Gabriel Bruck	6/8/13
2.2	Business Goals	Candida Rodriguez	6/9/13
2.3	Target Behaviors	Candida Rodriguez	6/10/13
2.4	Player Objectives & Motivators Analysis Documentation (employee surveys)	Candida Rodriguez and Frieda Orłowski	6/17/13
2.5	Link Business and Player Objectives	Frieda Orłowski	6/17/13
2.6	Success Metrics Plan (determine data analyses available for measurement- get from vendor)	Gabriel Bruck	6/18/13
3	Design and Development Phase	Owner	Date
3.1	Game Framework	All	6/28/13
3.2	Engagement Elements	All	6/28/13
3.3	Themes and Player Archtypes	All	6/28/13
3.4	Missions (including Leadership Missions)	All	6/28/13
3.5	Game Economy (rewards all inclusive)	All	6/28/13
3.6	PBLs	All	7/2/13
3.7	Levels	All	7/7/13
3.8	Success Factors Checklist	Candida Rodriguez and Frieda Orłowski	7/8/13
3.9	Design and Development Plan	Candida Rodriguez and Frieda Orłowski	7/13/13
4	QA and Testing Phase	Owner	Date
4.1	QA & Playtesting Documents	Gabe Bruck	7/19/13
4.2	Usability Testing Documents	Candida Rodriguez	7/19/13
4.3	Metrics and Gaps Documents	Gabe Bruck	7/16/13
4.4	Metrics Resolution Documents	Gabe Bruck	7/20/13
4.5	Pilot Launch Documents	Gabe Bruck and Candida Rodriguez	7/26/13

5	Close-out Phase	Owner	Date
5.1	Contract Close-out	Marina Kruk	7/27/13
5.2	Lessons Learned Document	Frieda Orłowski	7/27/13
5.3	Archive Project Documents	Marina Kruk	7/27/13
5.4	Administrative Project Close-out	Marina Kruk	7/27/13

6. Metrics

Metrics Gathering



Metrics - How We Will Measure Success

- **We need higher level of traffic and adoption of our Jive instance (@Shield) enterprise-wide.** We want to see usage specific to information sharing, problem solving, and communications across departments (as opposed to within departments). Need them to create communications, participate, load resources, view and use them, and treat @Shield like a central location for information and communications. Widespread use of the ideation module is highly desired.
- **Increase in usage of mature level users.** People are leveling off even as frequent users. Need to produce interest in the @Shield product as a business enhancing tool. Also, mature users should be advocates for @Shield, becoming mentors, and guides within the environment enabling adoption.
- **The goals of Internal Communications should be promoted.** This includes the new cultural change to A Great Place to Work, new Blue Shield Values goals, and knowledge posting and sharing in support of the cultural change.

Metrics Table

		Measurements	Other Proposed Metrics
1	@Shield Engagement	Increase @Shield usage by x%	<p>Metrics: Stats on increase in traffic, recurring visits</p> <p>Engagement: Engagement is how many premium actions your users make when they visit your site (actions like sharing with a social network, voting, commenting, etc.).</p>
2	@Shield Sharing and Collaboration	Increase @shield share and collaborate functions by x%	<p>Metrics: Stats on increase community creation and group creation, loading and sharing activities, ideation module usage, discussions, rewards for implemented ideas for solving problems, Stats on rewards for posting and sharing</p> <p>Virality: To measure virality, track how often users share, how influential they are (a unique click on a shared link), and how much they recruit (a unique sign up from a shared link).</p>
3	@Shield Maturity Usage	Increase @Shield maturity usage by x%	<p>Metrics: Stats for leveling up, leaderboards, mentoring relationships, rewards for onboarding employees to @Shield across departments</p> <p>Loyalty: To get an idea of how loyal your users are, divide your daily active users (DAU) by your monthly active users (MAU).</p>
4	BSC Values and Cultural Adoption	<p>Various predefined measures of BSC Values:</p> <ul style="list-style-type: none"> ● Trusted and Trusting ● Valuing People ● Results-Oriented ● Interconnected ● Creative Solutioning ● Agile and Nimble ● Customer-Centric 	<p>Metrics: Stats on Great Place to Work, rewards given for Blue Shield Values behavior</p> <p>Revenue: To see how much revenue you're bringing in per user, divide your monthly revenue by an average of your daily active users (DAU).</p>

Analysis Surveys & Polls

- Gather baseline metrics to see where participants are in their @shield "levels" (align with structured training levels)
 - Gather target demographics (Gabe)
 - Surveys for defining target psychographics (Frieda)
 - Run reports of participants and compare activity levels after the pilot (shoot for 10% uptick in activity) OR Take a sampling of the 500 and run compare b/a reports (~100) (Gabe)
 - Create baseline survey to measure where each participate is within their level of usage/optimization of the tool (align with training levels) (Stephanie)
 - Create final survey with same measurements to see where we moved the needle (Stephanie)
 - Look at a certain set of metrics before/after (Gabe will determine)
-

Project Scope Approvals

Prepared By:

Project Manager/Consultant

Date:

Approved By:

Project Sponsor

Executive Sponsor

Vendor
