Case Study: Developing an AR and VR Strategy at Kaiser Permanente

Founded in 1945, Kaiser Permanente is recognized as one of America's leading health care providers and not-for-profit health plans. The organization currently serves 12.2 million members in eight states and the District of Columbia.

SITUATION

The Kaiser Permanente (KP) Health Plan Workforce Development (HPWD) group has a simple mandate: to provide the most effective, efficient learning solutions possible to its internal customers. In doing so, HPWD plays an important role in attracting and retaining new generations of workers, an outcome crucial to KP's continued well-being as an organization.

HPWD provides learning solutions of all types to approximately 7,500 employees in customer sales, underwriting, and account management, health-plan product technology, marketing, operations, and support. Learning needs include everything from onboarding and career development to product knowledge and job-specific skills.

To achieve its goals, HPWD has long realized it must stake ground on the leading edge of learning practice and act as a learning thought-leader within KP. In 2018, augmented and virtual realities (AR and VR) were part of that leading edge and were generating widespread "buzz" in the learning and development world. However, HPWD needed to understand these technologies better before determining how they might be meaningfully applied at KP.

SOLUTION

HPWD engaged Innovative Learning Group (ILG) to 1) educate a small group of HPWD personnel in essential AR and VR characteristics, uses, and tools; and 2) help them develop an AR and VR learning strategy tailored to HPWD's needs. The joint HPWD and ILG team met for a two-day working session that addressed the first objective in context of tackling the second one. In addition to guiding the session, ILG provided HPWD with hands-on experience using sample AR and VR applications.

By the end of the second day, the team had defined the components of the strategy. After the meeting ILG documented the strategy in a report, which was reviewed, revised, and finalized with the help of HPWD. The components are described below.

VISION

Creating a vision for the future is an important first step in developing any learning strategy. Here, the HPWD participants described the AR- and VR-delivered learning they hope to have in place in five years' time:

"HPWD has successfully rolled out several targeted, sophisticated, performance-focused solutions using AR and VR technologies... Starting from onboarding and continuing throughout the employee's tenure at Kaiser, employees experience VR and AR solutions ranging from virtual reality tours of showcase Kaiser facilities...to contextual AR performance support that pushes critical information (such as product features or regulatory updates) at the moment of need."

The vision continues with the benefits that are being realized, such as the following:

- Reduction or elimination of travel costs between KP headquarters and its seven regions while still providing immersive "you are there" tours of important KP facilities

- Letting supervisors practice difficult person-to-person interactions in low-risk virtual environments using avatars

- Supplying field sales personnel with just the right customer-relevant information at just the right time based on their geographic location

- Enhancing, customizing, and reinforcing onboarding content by pushing information and activities to new hires based on their workplace, task, or time on the job

- Giving learners the opportunity to virtually observe and practice skills used in different physical contexts throughout the organization, all within their training classroom

The vision concludes with results: overall, as shown in performance-related evaluation data, AR and VR solutions have produced improved performance and shorter time to proficiency. Moreover, the solutions are meeting the expectations of KP's early-career new hires for the latest technologies; KP is perceived as a future-facing, "cool" place to work.

This vision guided or influenced the thinking throughout the rest of the strategy.

AUDIENCES AND MACRO LEARNING NEEDS

HPWD participants defined the major learning audiences by number, location, work characteristics and challenges, and key knowledge, skills, and tools used. This compilation of information is a necessary first step in determining and prioritizing learning needs.

Next, the team identified possible AR and VR applications that would be useful for each audience. This exercise helped the team tie the abstract concepts of AR and VR to the real-world context at KP.

LEARNING DELIVERY METHODS

This section is a survey of the different types of AR and VR technologies currently available, categorized by hardware used (phone-, tablet-, or headset-based). The description of each type includes characteristics such as learning purpose, cost, level of real-time performance feedback provided, whether it's hands- or cable-free or requires dedicated floor space, and complexity of using the equipment for learners.

PROCUREMENT

The HPWD participants defined the logic they expect to follow in obtaining AR and VR learning solutions. Procurement may include buying a solution from a vendor, building a new solution in-house or with external resources, or some combination of these. HPWD's set of criteria identify the circumstances for using each procurement method. The section also outlines how HPWD will divide tasks when partnering with vendors and lists additional factors (cost, timeline, internal capacity, audience) that will affect procurement decisions.

TECHNOLOGY AND INFRASTRUCTURE

This section describes the tools and facilities needed in three areas:

1. Development of AR and VR solutions. Software tools for developing AR and VR applications are categorized by their capabilities and level of coding expertise needed to use them. HPWD will use this information to determine what tools to use for in-house development of applications.

2. Tracking AR and VR solutions. Explains the advantages of using Experience API (xAPI) to track either bookmarking and completion of training solutions (typically VR) or usage metrics for performance-support solutions (typically AR) and how xAPI may be supported in KP's learning management system.

3. Facilities and other physical infrastructure. Provides requirements for setting up a "lab" location at KP headquarters where AR and VR solutions will be available for employees to try out. Once these types of solutions have become familiar to HPWD audiences, the lab will be used primarily for people to take headset-based VR training.

ASSESSMENT AND EVALUATION

The team defined an evaluation process HPWD could implement for AR and VR solutions. HPWD already has a robust process in place for evaluating conventional learning solutions. The AR and VR version will be an adaptation of it.

ORGANIZATIONAL STRUCTURE

HPWD participants identified the roles needed to implement the AR and VR strategy. Responsibilities and required skills and knowledge are described for each role.

IMPLEMENTATION PLAN

HPWD participants defined the steps needed to implement the strategy. The plan consists of specific tasks to be completed and is the indispensable final piece of the strategy. By providing small, concrete, relatively simple things to do, it provides a path to get started on something that otherwise may seem overwhelming.

RESULTS

Within the first seven months after the AR and VR learning strategy was finalized, HPWD completed the following tasks:

- Make KP learning leaders aware of the strategy and the potential of AR and VR learning solutions.

- Educate all HPWD personnel on the potential of AR and VR learning solutions.
  - Purchase KP-branded Google Cardboard-like viewers and select demonstration apps.
  - Provide sample AR and VR experiences to staff at the HPWD All Hands Meeting.

Meanwhile, the Executive Director of HPWD has set aside funds and is working with his team to plan the increasing integration of AR and VR solutions over the next four to five years. The goal? To reach the vision laid out in the learning strategy, in which AR and VR are just another couple of tools in the learning toolbox.

To learn more about how Innovative Learning Group can create custom learning solutions to help improve business results, contact us at **info@innovativeLG.com.**

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