

Guidelines for Launching a Knowledge Management Gamification Strategy

How to Make Gamification Work for Your Organization

Gamification is defined as the use of game mechanics and psychology to drive a specific set of behaviors within a target audience. More and more organizations are applying contests, points systems, leaderboards, and other aspects of games to increase employee engagement in business processes such as learning and development, innovation, and even knowledge management (KM).

A full-fledged gamification strategy is not right for every organization, but insights and techniques from gamification have the potential to enhance almost any KM program. Based on our research, APQC recommends that organizations looking to embrace gamification for knowledge sharing consider the following 10 guidelines, which are also listed in Figure 1:

1. Zero in on the behaviors you want to encourage—and the ones you don’t.
2. Start small and use targeted pilots to prove the concept.
3. Consider designing and testing the gamification approach first, then adding in technology.
4. Keep the game elements simple and intuitive.
5. Think broadly about the use of game mechanics.
6. Make sure people can see their impact—in real time if possible.
7. Offer meaningful rewards tied to professional development or career advancement.
8. Spread the recognition across the work force, not just a small group of top performers.
9. Accept that not everyone will be attracted to a gamified strategy.
10. Consider the ethics of gamification.

KM Gamification Guidelines

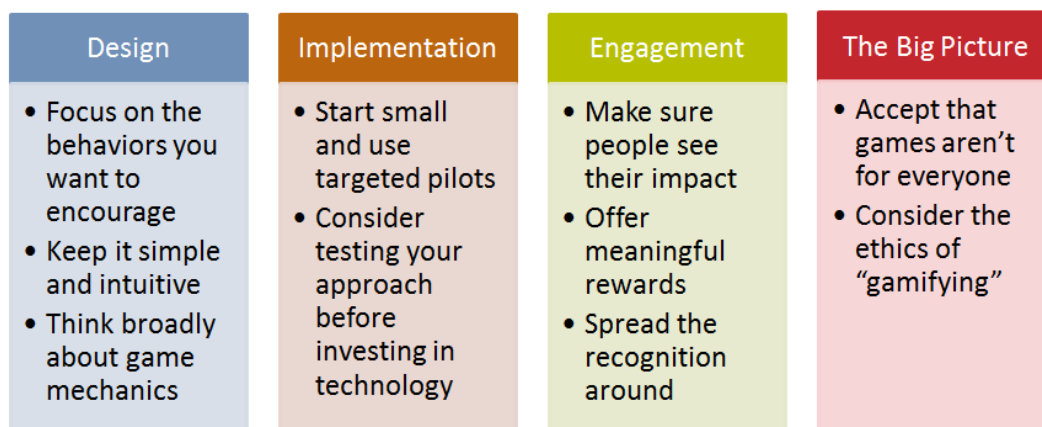


Figure 1

Below are descriptions of the guidelines using insights and examples from APQC and leading organizations. The included information was collected during an APQC virtual roundtable in February 2013 as well as secondary research and interviews with representatives from two organizations testing fledgling KM gamification strategies: Deloitte Touche Tohmatsu Limited and Wipro Technologies. For a brief introduction to gamification concepts, see [Gamification in Knowledge Management: An APQC Overview](#).

ZERO IN ON THE BEHAVIORS YOU WANT TO ENCOURAGE

Gamification is a new concept for many people, and the novelty of incorporating points, badges, and leaderboards into your KM program may increase interest in the short term. However, if people don't see underlying value in the activities being rewarded, enthusiasm will ultimately tail off. And this is exactly what's happening with some implementations: According to Gartner, 80 percent of current gamified applications will fail to meet business objectives by 2014, primarily because of poor design.¹ But what is good gamification design, and how do organizations achieve it? Tim Wendt, a senior software engineer at Rockwell Collins, recommended formulating a gamified strategy with the desired outcomes in mind: "What you're trying to do is steer someone toward a specific business goal." In other words, start by determining the value proposition for the organization and employees, just as you would with any other KM initiative.² Look for opportunities to improve engagement in your KM program, identify the actions or behaviors you want to encourage, and then shape the gamification strategy to target those behaviors.

This point was emphasized by Stephen Kaukonen, a senior manager involved in Accenture's efforts to use gamification to encourage microblogging, collaboration, and document sharing. According to Kaukonen, Accenture designed its strategy by "thinking through what it is we're trying to encourage people to do, both from a behavior perspective and from an activity perspective." The organization identified new tools and features within the knowledge sharing system that it wanted to highlight, pinpointed how it wanted employees to interact with those features, and then created a points system to encourage those actions.

Good design also involves thinking through what you *don't* want people to do and short-circuiting potential loopholes to "game the game." For example, Accenture does not inform employees how many points are associated with each knowledge-sharing action, and it limits the number of points someone can earn through each activity in a given quarter.³ These

¹ "Gartner Says by 2014, 80 Percent of Current Gamified Applications Will Fail to Meet Business Objectives Primarily Due to Poor Design." www.gartner.com/newsroom/id/2251015.

² Determine the Knowledge Management Value Proposition for the Organization and Employees." APQC Knowledge Base December 20, 2011: www.apqc.org/knowledge-base/documents/determine-knowledge-management-value-proposition-organization-and-employees.

³ Susan Hanley. "Let's Play! Using Gamification to Encourage KM and Collaboration." *NetworkWorld.com* October 19, 2012: www.networkworld.com/community/blog/let's-play-using-gamification-encourage-km-and-collaboration.

safeguards guide employees toward a balanced and sensible approach, rather than—for example—posting 500 microblogs and ignoring the rest of the knowledge-sharing system in order to run up points.

Finally, in order for gamification to support learning and behavior change, it must be sufficiently linked to employees' day-to-day work. Rebecca Smith, a senior systems engineer at Rockwell Collins, warned against gamification for gamification's sake. Unless the game feels relevant, she said, employees may turn around and say, "It's a great game and a good escape, but how do I relate that back to what I have to do when I go back to my desk?" A tenet of good game design is that employees see how participation will support some aspect of their professional development or job performance.

START SMALL AND USE TARGETED PILOTS

Most organizations are still experimenting with gamification, using limited deployments to garner employee reactions and assess the technique's value in enhancing knowledge sharing and collaboration. When selecting a pilot, look for an area of the business where the required data is either already being collected or is relatively easy to track. Then start testing different approaches to see what motivates your work force and fits into your existing culture.

Accenture started with a narrowly targeted gamification program, and Stephen Kaukonen identified this as a critical success factor. "One thing I think we've done right is that we started small," he said; "we haven't tried to roll out a big-bang, all-encompassing approach." This allowed the firm to look at the data that was being collected, react to it, and evolve the strategy over time.

Similarly, Deloitte is experimenting with several implementations, including one in its Postdigital Enterprise community that uses a points system to reward employees for responding to collaboration and knowledge requests sent out via microblogging. While the program has garnered a lot of interest from employees, it is still relatively new, having launched in autumn 2012. Calvin Cheng, a technology manager with Deloitte Consulting LLP who helped spearhead the initiative, said his group is "blazing the trail" within Deloitte. He explained that, because of the positive response gamification has received, people in other parts of the business are reaching out to ask whether his group can help set up gamification strategies for their industry or interest groups. In this way, a successful pilot program can spread organically across the organization.

EMPHASIZE THE APPROACH OVER THE TECHNOLOGY

Technology is an important component of many gamification approaches, but if you begin by implementing an expensive software solution, it may end up driving your entire strategy. Some firms are experimenting with commercial software from vendors like Badgeville, but others are prototyping their approaches using as little technology as possible. The theory is that, once the

designers are sure the games work as intended and motivate the right behaviors, they can add in supporting technology as needed.

Calvin Cheng explained that, in order to get the Deloitte Postigital Enterprise team's gamification implementation up and running quickly, he did not emphasize the development of the back-end technology. The presentation layer is polished, but the system for tracking points and attributing them to users is currently housed in a Microsoft Excel spreadsheet. He identified the back-end tracking as an area his team intends to improve now that it has launched the gamification program and proved that it works to spur cross-practice collaboration.

Similarly, Wipro Technologies chose not to focus on technology during its early gamification rollout. While some of the organization's games have digital components, many favor face-to-face interaction over virtual tools. For example, Wipro has created a knowledge-sharing game based on cricket, a team sport that is popular in India where Wipro is headquartered. The cricket game is currently structured as an in-person activity where teams of employees ask and answer trivia-style questions. Part of the value of the game is that it creates a fun social setting where employees can meet each other, network, learn, and share knowledge face-to-face. However, now that Wipro has proven that gamification is an effective way to inspire learning and sharing, it is considering developing more online games. This would allow it to engage an even greater percentage of the work force and encourage collaboration among employees in different locations.

KEEP IT SIMPLE

Those who have experimented with gamification emphasize the importance of not overcomplicating things. The consensus is: If participants need to study the rules and the scoring system, then they are probably too focused on the game itself, instead of the activities the game is designed to encourage.

According to Deloitte's Calvin Cheng, "If you have to explain it to people, then it's too complicated." When the Postdigital Enterprise team rolled out its gamification strategy, he was given five minutes to outline the program to potential participants. In that time, he was able to explain the purpose of the initiative, how it would work, and the incentives being offered. The process was kept very straightforward: Employees look for a specific hashtag in their corporate microblog feed and then respond to requests posted using that hashtag. This structure gives the team flexibility to post different types of requests and opportunities through the system without excessive constraints.

Wipro Technologies also emphasizes simplicity in its games. For example, the organization's KM onboarding process includes an arm-wrestling exercise where two employees try to pin each other's hands to the surface of a table. Unlike in traditional arm wrestling, where opponents work to score points individually, the participants are told to *collectively* score as many points as they can within a given period of time. The objective is for participants to realize that, if they

simply move their clasped hands back and forth touching the table as many times as possible, they will achieve a much higher joint score than if they resist each other. Despite the game's seeming simplicity, it is a powerful way to demonstrate the importance of collaborating with colleagues in other divisions and business units. "The point is to not see everyone as your rival," explained Dr. K Hariprasad Reddy, head of knowledge management at Wipro Technologies. "If you think of others in the organization as your competitors, then minimal collaboration will happen."

THINK BROADLY ABOUT THE USE OF GAME MECHANICS

Thomas Hsu, an expert in global knowledge management at Accenture, recommended that organizations think beyond just points and badges when considering gamification strategies. You need to be "thoughtful about your design," he suggested, and "tap into other elements of game design thinking such as narrative, progression to mastery, aesthetics, and fun." Deloitte Community Evangelist Stan Garfield echoed this sentiment, saying, "It's not always about gaming, it's the use of the mechanics." While some organizations may want to build all-out games, others may prefer to incorporate simple mechanisms such as a bar showing what percentage of an employee's expertise location profile has been completed. Still others may tap into the narrative aspect of games to position use of the KM system as a journey toward increased knowledge. Such devices are not games, but they take elements of games and use them to motivate people the way a game might.

One organization considering this type of subtler strategy is Intel. According to Steve Kasper of Intel - HR, his team wants to incorporate game functionality into its KM systems, but in a way that will be "invisible to the user, so they don't really know they're playing a game." In the envisioned system, employees would earn points when they update their expertise profiles, post knowledge, and rate and comment on others' knowledge. Based on their scores, the system would assign them to various levels, such as novice user, expert user, and so on. When employees reach each successive points threshold, their status within the KM system would change and they would receive congratulatory emails as well as some more public recognition. However, the actual points system would not be advertised or visible to employees—only the changing status levels.

Rockwell Collins is also interested in the more indirect application of gamification techniques. "I've got to be honest, the word gamification hasn't really come up in our KM strategy at all," said Lynda Braksiek, manager of knowledge and critical skills management at Rockwell Collins. "But now that we look back at what we do, we have elements of it out there." For example, at one point the organization storyboarded a search function that emulates the way World of Warcraft gradually discloses information and tips to users as they progress through the game. "When you start out a game, it gives you a very simple user interface," Tim Wendt explained. But "as you move up, it exposes more and more functionality, so it gives you mini-tutorials as you go." Wendt's team thought the same technique could be applied to the corporate search

function. The idea is that a user would be given only basic guidance when they first started to use search. Then, once they gained some experience—for example, after they performed 10 searches—additional suggestions would pop up based on the type of search the employee was conducting.

MAKE SURE PEOPLE CAN SEE THEIR IMPACT—IN REAL TIME IF POSSIBLE

Gartner cites accelerated feedback cycles as one of four principal means of driving employee engagement through gamification.⁴ Traditionally, employees are evaluated in annual reviews, creating long intervals between performance milestones. This is particularly true for knowledge sharing and collaboration, which are often treated as subsidiary aspects of job performance and not assessed during monthly or quarterly reviews. However, a gamified KM system can provide concrete, activity-based feedback on employees' knowledge-sharing behaviors. As people contribute, transfer, or reuse knowledge, their point totals, number of badges, or leaderboard positions go up accordingly—and the feedback is visible not only to each individual, but also to his or her peers.

Thomas Hsu of Accenture points to this feedback as one of the key parallels between video games and enterprise gamification. “Every meaningful action you take in a video game is captured, tracked, and encapsulated in—for example—your total score, your achievements, or your character's special items and abilities.” Seeing an accumulated score or set of accomplishments is one of the motivating factors that make people spend time playing and mastering complex, role-based video games. Similarly, enterprise gamification is more likely to succeed over the long term if employees see the impact of their actions reflected instantly in the system.

Many organizations experimenting with enterprise gamification are still grappling with the complexities of real-time scoring. Some gamified learning and development tools provide instant feedback, such as the badges awarded through Deloitte Leadership Academy. However, with approaches that reward employees for a range of knowledge-sharing behaviors, organizations have found it easier to update scores and leaderboards at set milestones, rather than providing instant updates. Accenture, for example, calculates points and rankings on a quarterly basis—though this is an aspect the organization is actively seeking to enhance.

OFFER MEANINGFUL REWARDS

Although not strictly required, most organizations tie performance within their gamified enterprise systems to some form of incentive structure (beyond seeing one's name on a leaderboard). Monetary awards may be appropriate in some situations, but professional

⁴ “Gartner Says By 2015, More Than 50 Percent of Organizations That Manage Innovation Processes Will Gamify Those Processes.” www.gartner.com/newsroom/id/1629214.

development opportunities—such as attending a conference or sitting down with a senior leader—are usually easier to administer and more motivating.

When Deloitte's Postdigital Enterprise team launched its gamification strategy, it consulted the HR and legal departments regarding the prizes it might offer. After realizing that monetary gifts might carry tax implications, the team decided to focus its incentives on career development and networking opportunities. For example:

- ▶ Practitioners can exchange the points they earn for a chance to join a practice call and talk about a Postdigital trend or capability of interest to them.
- ▶ Another prize, called “coffee chat with a partner,” provides an opportunity to talk one-on-one with a Deloitte principal, partner, or director (P/P/D) and discuss a wide range of topics.
- ▶ The grand prize is a chance to accompany a Deloitte Postdigital P/P/D to a conference at which they are presenting.

In addition, the team advises partners and leaders to check the leaderboard when staffing projects in order to recognize those practitioners who have contributed to the practice and to tap into new sources of talent for project teams.

Some organizations are even starting to think about linking gamification to performance management. According to Stephen Kaukonen, this is something Accenture is actively pursuing. “At the end of the day, that’s where you get the biggest bang for your buck,” he explained. “It’s one thing to create an engaging environment through badges, points, and leaderboards, but until you tie it back to performance management, it’s not going to have as big an impact.” Currently, Accenture provides internal career counselors with information about employees’ scores and rankings within the gamified KM system so that they can share this information with their counselees, sparking conversations about the extent to which the employees are actively sharing knowledge. “We continue to work closely with performance management within Accenture to make this a standard component of how people get rated,” Kaukonen said.

SPREAD THE RECOGNITION AROUND

In addition to providing meaningful rewards, organizations must distribute those rewards equitably and effectively. To this end, recognition opportunities should be competitive, but not *too* competitive. If rewards are limited to the top echelon of participants, the rest of the work force will quickly realize they’re “out of the game” and lose interest. Organizations typically achieve better results when they offer incremental incentives, allowing top performers to be rewarded appropriately while still creating opportunities for less involved participants to be recognized.

Stephen Kaukonen emphasized this point, saying that Accenture has learned the importance of “spreading the recognition and making sure you don’t get too stringent around recognizing people.” When the organization first implemented its KM gamification strategy, it recognized the top 25 point earners each quarter. Now, Accenture has expanded its recognition program,

offering multiple reward tiers encompassing 9,000 employees quarterly—approximately 3.5 percent of the work force.⁵

Wipro Technologies is considering similar changes to one of its games in order to motivate a broader range of employees. Using data from Wipro’s knowledge base portal, the game tracks employees’ knowledge-sharing behaviors, translates them into points, and then displays the scores as relative positions in a marathon race. Although race leaders are acknowledged monthly, the game is designed to span an entire fiscal year, with employees accumulating points and changing positions in the marathon throughout the year. The result is that many employees fall out of the running relatively early and lose interest, realizing they are too far behind to catch up to the leaders. This tends to limit the game’s motivational impact to a handful of top performers, rather than spreading it out over the entire staff.

To address this concern, Wipro is considering resetting the scores and announcing an entirely new set of winners each month. This would prevent employees from getting overly discouraged and would enable the organization to acknowledge the contributions of a larger percentage of the work force.

ACCEPT THAT NOT EVERYONE WILL BE MOTIVATED BY A “GAME”

It’s important to remember that employees from different generations, cultures, and parts of the business have different motivational triggers. A gamification strategy may draw in a certain subset of the work force, but it won’t appeal to everyone. For example, according to Calvin Cheng, participants in the Deloitte Postdigital Enterprise team’s gamification approach tend to be young, tech savvy, and work in the organization’s consulting practice as opposed to its tax and audit groups. Demographics are not destiny when it comes to gamification, but it’s natural that a game based on enterprise microblogging and crowdsourcing would appeal more to Millennials, who are almost three times more likely to use Twitter in their personal lives.⁶ Other gamification implementations not focused on microblogging may draw in a broader audience, but participation is still likely to skew toward the younger end of the work force—and gamification will not appeal even to all younger employees.

Because of this diversity of attitudes, a KM gamification strategy should complement—not replace—other change management and engagement efforts. “I don’t think we can ever assume that our entire organization is going to learn or care about a game,” said Lynda Braksiek of Rockwell Collins. “While gamification is really cool—just like social media is really cool—there are still going to be people who have to learn and gather information in a different way.” The KM team can encourage employees to experiment with new methods such as gamification, but

⁵ Hanley: www.networkworld.com/community/blog/let's-play-using-gamification-encourage-km-and-collaboration.

⁶ Maeve Duggan and Joanna Brenner. “The Demographics of Social Media Users – 2012.” Pew Research Center February 14, 2013: pewinternet.org/~media/Files/Reports/2013/PIP_SocialMediaUsers.pdf.

these methods should be folded into a portfolio of approaches designed to accommodate a variety of preferences and learning styles.

CONSIDER THE ETHICS OF GAMIFYING YOUR APPROACH

During APQC's February 2013 roundtable on gamification, APQC Executive Director Cindy Hubert asked whether anyone saw a "dark side" to gaming, given its potentially addictive nature and the chance it may impact behavior beyond the context of the game. Despite organizations' best intentions, could enterprise gaming actually instill *bad* habits and lead to a more cut-throat, competitive work environment? And might some employees focus too much attention on the game in comparison to their core work responsibilities?

While the consensus was that enterprise gaming had a long way to go before addition became a concern, Andrea Stevenson of Deloitte emphasized the importance of good design in avoiding overuse and negative outcomes. "It all comes back to being really clear about why you have the game, what is the purpose, what are the objectives, what are the behaviors that you're trying to encourage or the results you're trying to get from it," she said. If—theoretically—employees were spending too much time on the game or it was encouraging excessive competition in the workplace, that would be a sign of "the underlying mechanics or the underlying definition of the game being wrongly skewed."

In addition, several roundtable participants mentioned the importance of full disclosure to ensure that the gamification strategy motivates employees without manipulating them. Organizations do not have to reveal everything about their gamification systems—and in fact, some details may need to be held back to prevent cheating—but the branding and communications used to promote the "game" should make the goals, outcomes, and overall process clear.

FURTHER READING

For more information about the use of gamification to increase KM engagement, including case studies of some of the organizations mentioned in this article, see APQC's [Gamification in Knowledge Management Collection](#).



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