



5 Ways to Elevate Leadership Development With **Inbox Simulations**

Matthew Shell

Senior Business Development Manager

AUGUST 2022

Agenda

1. Key Takeaways & About Capsim

2. The Current Environment

- The Importance of Soft Skills
- The Problem with Skill Development
- Top Challenges

3. The Way Forward

- The Future: Assessment Technologies
- Introduction to Inbox Simulations

4. Success Stories

- Caterpillar
- Yellow
- S&P Global Market Intelligence
- Microsoft
- **Defense Contractor*

5. Special Offer

6. Questions

Key Takeaways

- **But what's the goal?**
- **Help training professionals develop their most important resource: their people.**
 - Real-world learning reinforcement
 - Objectively assess soft skills
 - Customize and personalize training
 - Measure training impact
 - Streamline succession planning
- **Inbox simulations are the key**





35+ years of experience with on-site and virtual programs

Management Trainings, Fast Track Development, High Potential Employees,
Strategy & Business Acumen, Executive Training, Custom Inbox Simulations



Folders

Inbox 15

Sent Items 3

Drive

Company Information

Your Role

Instant Messages

KG Kenny Green
Today, 9:13 am**JD** Jordan Dunn
Today, 8:07 am

Filter: All Flagged

BT Brendan Tagen
Marketing Associate
Today, 4:09 PM
CircaTech Presentation**JP** Jed Parker
Region 3 Sales
Today, 3:57 PM
Thanks to the Ubiquitools Team**CD** Chris De'Boten
VP Sales & Operations
Today, 1:12 PM
RE: Sales Goals for this Year**JG** Jennifer Grawl
SVP Sales & Operations
Today, 9:34 AM
Office Space**TS** Tellula Styles
Production Supervisor
Today, 8:57 AM
Employee Safety Issue**KU** Kia Usman
Research Assistant
Today, 8:22 AM
Interesting Study

CircaTech Presentation

BT Brendan Tagen
Marketing Associate
4:09 PM

Thank you again for choosing me as the recipient of the Service Excellence Award! It means so much to me - working here for the past year has been incredibly exciting.

I also wanted to let you know that I really appreciated the positive feedback on my job performance during our last one-on-one meeting. We had also talked about taking on more responsibility. This morning Sanjay told me that we might have a chance to expand our business to a large and distinguished client.

I know that I haven't done presentations for a client this big yet, but I'd love the chance to tackle this challenge. Let me know what you think.

- Brendan

- A. Allow Brendan to attend the presentation in order to learn the ropes.
- B. Explain that this is too big of opportunity to use someone without more experience.
- C. Ask him to create a first draft of the presentation to give to the team for feedback.

CapsimInbox Sample Moment: Business Management

The Current Environment



- **Developing soft skills is critical**
 - Your people are your greatest resource.
 - Instrumental to executing your strategy
- **Soft skills more critical than ever**
 - Must be resilient in an ever-changing environment
 - Communication even more critical with increased virtual work
 - Soft skills = career durability

The Importance of Soft Skills

- Soft skill development is the #1 priority for companies (LinkedIn 2018)
- 92% of hiring and training professionals say soft skills matter more than hard skills (LinkedIn 2019)
- 63% of organizations are willing to hire someone with transferable soft skills then train to full proficiency

The Struggle of Skill Development



The Current State

- **70% of employees** say they don't have mastery of the skills needed to do their jobs ([Gartner](#))
- Only **12% of employees** apply new skills learned in L&D programs to their jobs ([Shift eLearning](#))
- Only **25%** believe that training measurably improved performance. ([McKinsey](#))

Challenge #1

Real-World Application

Providing relevant, real-world situations to practice applying knowledge

- Forgetting curve (use-it or lose-it)
- Context is key, but on-the-job training is risky
- Lack of relevancy to day-to-day tasks, impractical

Challenge #2

Accurate Assessment

Accurately assessing the proficiency of soft skills for each individual

You can't improve what you can't measure

- Self-assessments are inaccurate
- Behavioral questions aren't predictive of on-the-job behavior and performance
- Soft skills are inherently behavioral, need to see them in action

Challenge #3

Quality Feedback

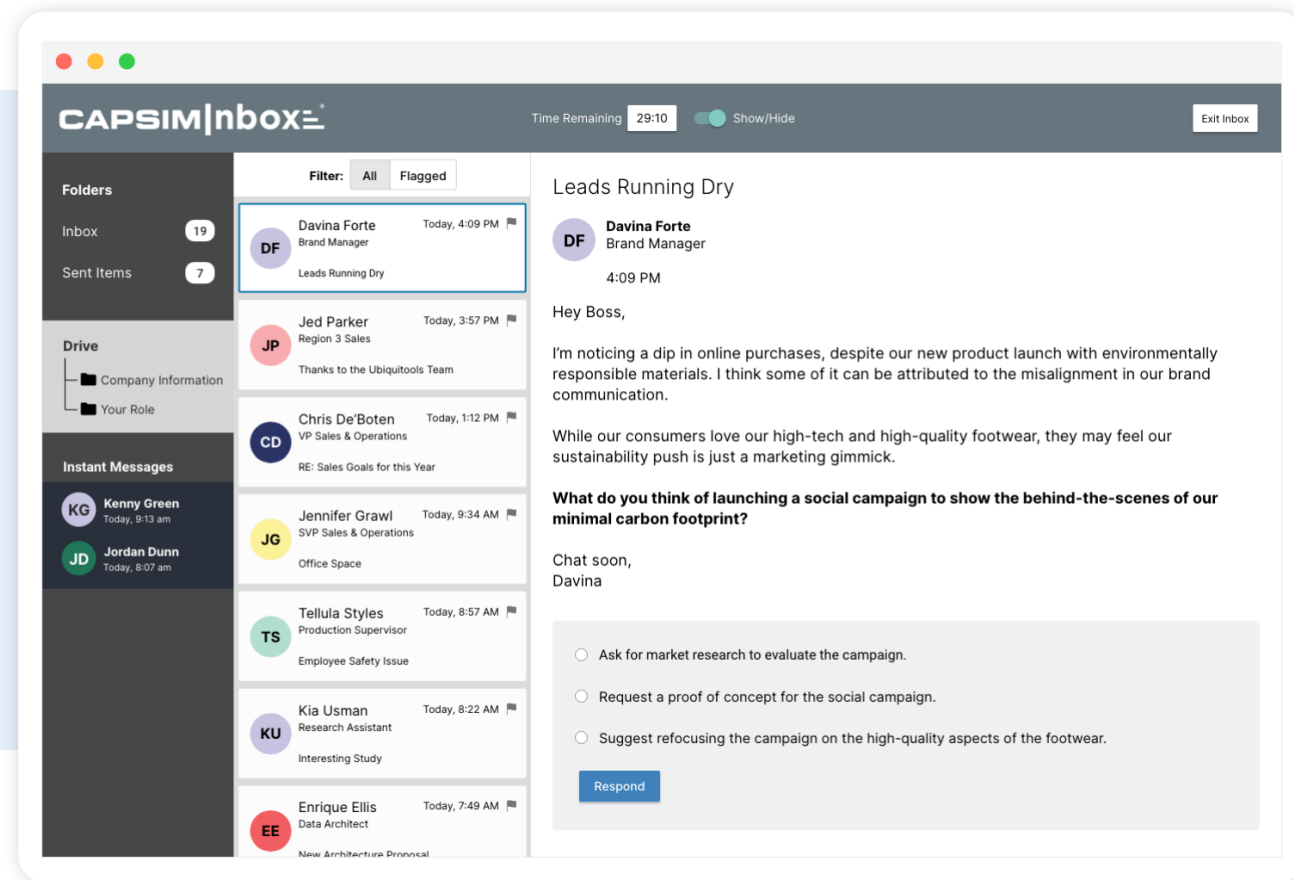
Providing quality feedback to improve in areas of weakness

- Most critical, but you need to overcome challenges 1 + 2 first
- Generic, one-size fits all approaches means no individualized feedback
- Your company is unique, so your training should be too



Inbox Simulations

- Mirrors email interface
- Straight-forward and intuitive
- Respond to prompts and make decisions
- Valid and customizable



THE EDTECH AWARDS



COOL TOOL WINNER 2022

//CODiE//
2021 SHIA CODIE FINALIST

//CODiE//
2020 SHIA CODIE FINALIST



Simulation-based behavioral assessment

The Way Forward

How do we get soft skill training right?

- Immersive, custom training via Inbox simulations
- **Right People** → Who has the potential?
- **Right Skills** → Where are their skill gaps?
- **Right Way** → Can they practically apply their skills?





From: Jane
Subject: Instrument sterilization

After a relatively routine procedure in the OR, one of our techs discovered that the instruments used during surgery had not completed the sterilization process.

The instruments were used by an unaware Dr. Andrews during a successful repair of a hiatal hernia on the patient.

There's currently no sign of infection. The patient and his family are currently unaware of the situation as we continue to examine the details of the incident. **How should we proceed?**

- A. Have Jane schedule a root cause meeting immediately.
- B. Reply to Jane 'Thank you, let me know what you need from me.'
- C. Reply to Jane that we need to notify the family right away.

What would you do?

J

From: Jane
Subject: Instrument sterilization

After a relatively routine procedure in the OR, one of our techs discovered that the instruments used during surgery had not completed the sterilization process.

The instruments were used by an unaware Dr. Andrews during a successful repair of a hiatal hernia on the patient.

There's currently no sign of infection. The patient and his family are currently unaware of the situation as we continue to examine the details of the incident. **How should we proceed?**

- A. Have Jane schedule a root cause meeting immediately.
- B. Reply to Jane 'Thank you, let me know what you need from me'.
- C. Reply to Jane that we need to notify the family right away.

What would you do?

A

Have Jane schedule a root cause meeting immediately.

+10 points: Delegation

+10 points: Leadership

+10 points: Problem-Solving

+10 points: Prioritization

B

Reply to Jane 'Thank you, let me know what you need from me'.

-1 points: Problem Solving

-1 points: Leadership

C

Reply to Jane that we need to notify the family right away.

+3 points: Delegation

+3 points: Prioritization

+3 points: Problem-Solving

Email #29

Jane Fritz
Director of Nursing

JF

Root Cause of Meeting

A Have Jane schedule a root cause meeting immediately.

B Reply to Jane 'Thank you, let me know what you need from me!'

C Reply to Jane that we need to notify the family right away.

Email #41

Jane Fritz
Director of Nursing

JF

OR Issues

Email #33

Dr. Andrews

DA

OR Incident

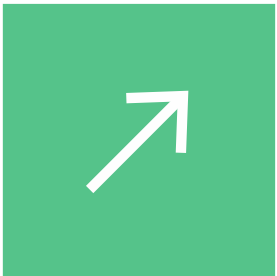
CapsimInbox Sample Moment: Healthcare Administration

Training with Inbox Simulations



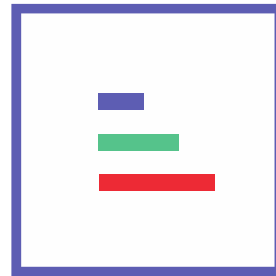
- Immersive learners in authentic, real-world experiences
- Accurately assess performance with empirical data
- Provide instantaneous and individualized feedback
- Create an action plan to develop skills needing improvement
- Repeat assessment to catalog longitudinal development

3 Options to Consider



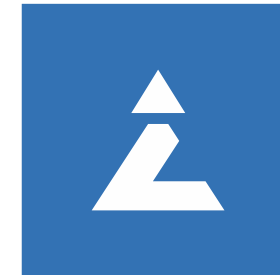
Leadership Development Series (Ready-to- Use)

- Choose from Capsim-created experiences
- Immediate Implementation
- Comparative results with global data



Custom by Client

- SaaS-style Authoring Platform
- Develop at your pace
- No developmental or access fees



Custom by Capsim

- Developed by Capsim's Subject Matter Experts
- Fast development
- Minimal touchpoints with your team

Success Stories

1. **Caterpillar:** LDS, Skills Gaps Analysis
2. **Yellow Corporation:** Custom, Succession Planning
3. **S&P Global Market Intelligence:** Custom, Certification
4. **Microsoft:** LDS, Measuring Training Impact
5. ***Defense Contractor:*** Custom, Role-Specific Assessment



Caterpillar

**Objectively measure
soft skills**



Caterpillar




Illinois-based construction manufacturing company

Challenge: Assess soft skills of sales managers globally

- International Executive Education Program via Rutgers
- 10-month online training program
- Did not provide objective measurement of skill development

Solution: Leadership Development Series

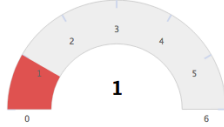
Overall Performance 1



60th Percentile

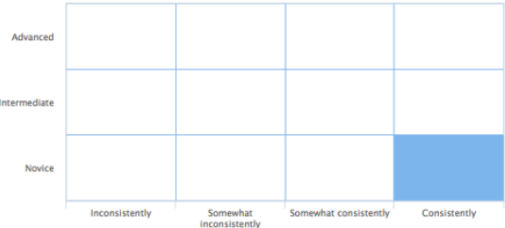
Your overall performance was at the 60th percentile. This overall score is based on how quickly and accurately you responded to the emails and messages during the exercise. The score is a percentile, which shows your overall performance relative to the CapsimInbox database. A score of 60th percentile means that you performed higher than 60% of the individuals in the database.

Self Awareness 3



Your self-awareness index is a 1. This score reflects how accurately your self-assessments match the objective assessments produced by CapsimInbox. Higher scores equate to more accurate self-awareness. Your score indicated that you are currently very low in self-awareness accuracy. When you are inaccurate, it is due to under-rating yourself. It is important to recognize that an accurate understanding of your skills is the essential first step to improving these skills.

Development Index 2



Advanced				
Intermediate				
Novice				
	Inconsistently	Somewhat Inconsistently	Somewhat consistently	Consistently

Your development index shows your current level of skill proficiency is at the Intermediate level. Across the five skills, you Inconsistently demonstrated this Intermediate level of proficiency. Your ultimate goal for professional development is to consistently demonstrate an advanced level across all five skills.

Skill Gap 4

Below are your scores on three essential skills that relate to effective time management. Also shown is how you rated yourself on these skills. Gaps that span two colors are often the most in need of development.

● Self Assessment ◆ Inbox Assessment

- Organizing** ●: Self Assessment at 10, Inbox Assessment at 50. Gap spans red and yellow.
- Leading** ●: Self Assessment at 20, Inbox Assessment at 60. Gap spans red and yellow.
- Problem Solving** ●: Self Assessment at 30, Inbox Assessment at 70. Gap spans red and yellow.
- Communicating** ●: Self Assessment at 20, Inbox Assessment at 60. Gap spans red and yellow.
- Initiating** ●: Self Assessment at 10, Inbox Assessment at 50. Gap spans red and yellow.

Results

Benefits: Leadership Development Series

- Ready-to-use allowed for instant implementation
- Global percentile data for comparison
- Self-directed, low admin involvement

Outcomes

- **Make training initiatives more impactful (focus on critical skills gaps)**
- **Accelerate development**



Yellow Corporation

Succession Planning



Yellow Corporation



Kansas-based transportation holding company

Challenge: Assess incoming first-level operation managers

- Need to evaluate skills of new employees right after hire
- Prioritize training for areas in most need of improvement
- Identify high-potentials to fast-track development

Solution: Custom by Client

CAPSIM|inbox
General Management Logout

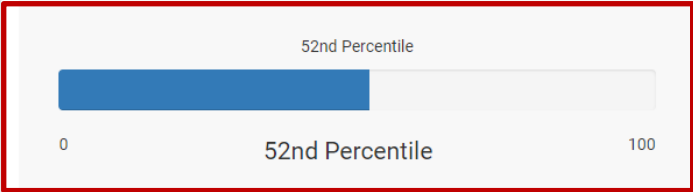
Dashboard

- Course Settings
- Skill Scores
- Administrative Resources
- My Courses

Dashboard

Class Average

Overall Score



0 52nd Percentile 100

Skill Scores

Skill name	Score
Organizing ⓘ	53
Leading ⓘ	52
Problem Solving ⓘ	63
Communicating ⓘ	60
Initiating ⓘ	55

Course Roster

[View Skill Scores](#) [Generate CSV](#)

Search Table

Name	Overall Score	Self-Awareness Score	Development Index	Inbox Completion Date	Assessment Completion Time	IDP Completion Date
Helm, Amanda	99	6	Advanced, Consistently	09/12/2019, 1:32 pm	52 minutes	-
DiMarco, Abraham	98	1	Advanced, Consistently	05/15/2020, 10:43 am	27 minutes	-
Zimmermann, Kelsey	97	5	Advanced, Consistently	11/17/2020, 5:34 pm	27 minutes	11/17/2020, 10:47 pm View

Results

Benefits: Custom by Client

- Created a custom solution in just a few hours' time.
- Content pulled from real pitfalls/ challenges faced within Yellow
- New Day-1 assignment for new staff

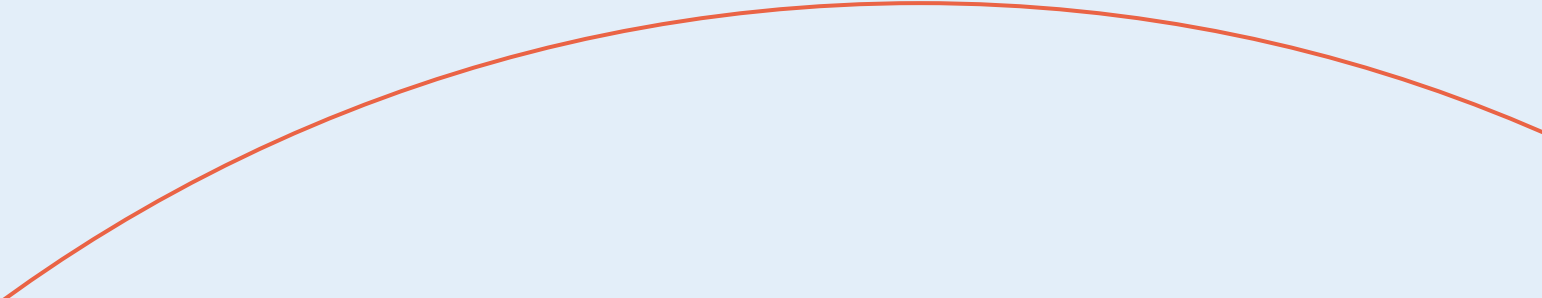
Outcomes

- **A custom solution that measures the skills that matter most for operations roles**
- **New hires have a more meaningful**
- **Prioritize further trainings and identify emerging leaders at scale**



S&P Global Market Intelligence

**Reinforce learning with authentic,
day-on-the-job experiences**



S&P Global Market Intelligence

S&P Global
Market Intelligence

Multi-asset class & real-time data provider

Challenge: Provide Platform certification to clients in a practical and engaging way.

- Relevant for clients across academia, corporations, government, etc.
- Standard click-thru trainings were not engaging or immersive
- Need to expedite certification process, previously manually done

Solution: Custom by Client

The image displays two overlapping screenshots of a web application interface. The background screenshot shows a dashboard for the 'Capital IQ Certification Program'. The top navigation bar includes the S&P Global Market Intelligence logo, a welcome message for 'Matt Shell', the course name, and a 'Logout' button. A left sidebar contains navigation links for 'Dashboard', 'My Account', and 'Course Page'. The main content area features a table titled 'Capital IQ Certification Tool' with columns for 'Section', 'Start', 'End', and 'Status'. Below the table are two buttons: 'Feedback Report' and 'Individual Development Plan', both marked as 'Not Available'.

Section	Start	End	Status
Equity Research	08/31/2020 12:01 am	12/31/2022 11:59 pm	Begin
Industry Analysis	08/31/2020 12:01 am	12/31/2022 11:59 pm	Unavaila
Financial Analysis	08/31/2020 12:01 am	12/31/2022 11:59 pm	Unavaila
Equity Valuation	08/31/2020 12:01 am	12/31/2022 11:59 pm	Unavaila
Relative Valuation	08/31/2020 12:01 am	12/31/2022 11:59 pm	Unavaila

The foreground screenshot shows an email inbox interface. The top bar includes the S&P Global Market Intelligence logo and an 'Exit Inbox' button. A left sidebar lists 'Folders' (Inbox with 1, Sent Items with 7) and 'Drive' (Company Files, Financial Documents, Course Videos). The main area shows a message from Raquel Hanson, Associate Director, titled 'Under-priced or Overpriced?'. The message body includes a greeting 'Hello Matt,' and a request for feedback on an investment in LUV. Below the message is a rich text editor with a 'Respond' button.

Results

Benefits: Custom by Client

- Repurposing existing training materials
- Interacts directly with proprietary platform
- Streamline certification process

Outcomes

- **Increased learner engagement with a high-fidelity experience**
- **Give learners the skills to apply Capital IQ data in real-world scenarios.**
- **Saved time by automating certification process**



Microsoft

**Measuring the impact of training
(Pre-/Post-Test)**



Microsoft





Multi-asset class & real-time data provider

Challenge: Empirically measure training impacts from new program




- Launched a new “Journey to Principal” program, need to assess impact
- Cohort of highly technical ICs aspiring for next stage in career
- Must be conducted virtually, across 14 countries on 3 continents

Solution: Leadership Development Series

Overall Percentile

CapsimInbox Version	Percentile
General Management ⓘ	 49th Percentile
People Management ⓘ	 71st Percentile

Skills Scores

Skill	Percentile	Net Change ⓘ
Organizing ⓘ	 54 → 61	+7
Leading ⓘ	 37 → 28	-9
Problem Solving ⓘ	 46 → 95	+49



It's the ultimate validation of your training efforts to be able to say "here's where we were, and here's where we are now". Most training is technical, so it's easy to see that change. CapsimInbox lets us see it, even when the results aren't technical and in your face.

Jim Chismar PMP, ProSci CMP
Team Manager in M365 FastTrack Center, Microsoft

Results

Benefits: Leadership Development Series

- Immediate skill gap analysis at beginning of program
- Quantify the skill development at the end of the program
- Track learner skills longitudinally from this point forward

Outcomes

- **Pinpoint current skill proficiencies at program start**
- **Empirical measurement of skill development after post-test and beyond**
- **Remediate future programs to be more effective based on post-test results**

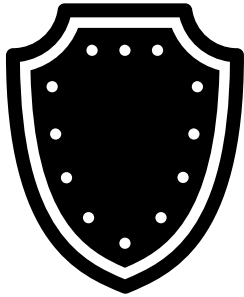


Defense Contractor

**Customize and personalize training
in a relevant context**



Defense Contractor



U.S.-based military defense contractor

Challenge: A company- and role-specific simulation to assess key skills

- Need for a highly customized simulation based in a **fictionalized version** of company
- Assess one's fundamental understanding of **program management**
- Assessment **must align** with long-established performance indicators
- Content must be based on **real experiences** of project managers at the company

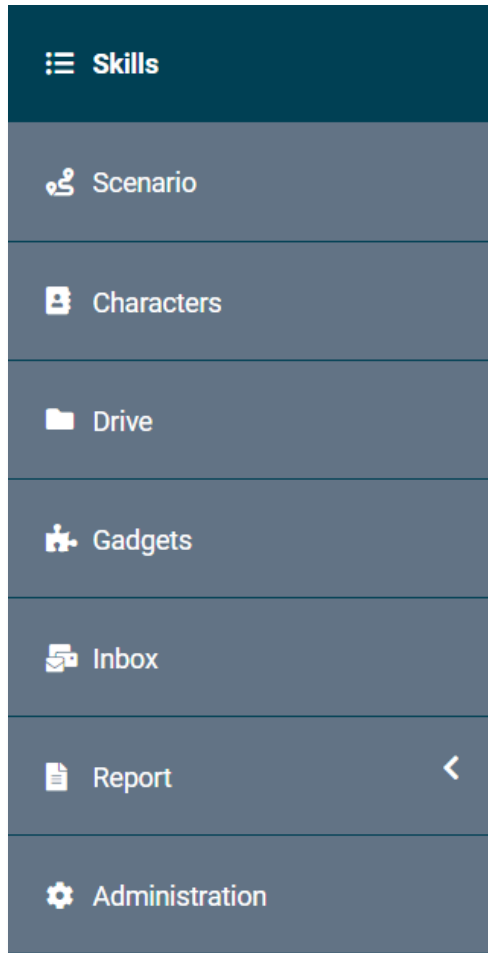
CAPSIM|Inbox™

AUTHORING PLATFORM

- Web-based, no-code solution
- Fully customizable
- Modify existing resources
- Collaborate w/ SMEs
- High accessibility and applicability
- Focus on content, not the environment

The screenshot displays the CAPSIM|Inbox Authoring Platform interface. The top navigation bar includes the logo, 'Help & Support', and 'Exit Project'. The main content area is titled 'General Management Demo' and features a sidebar with navigation options: Skills, Scenario, Characters, Drive, Gadgets, Inbox (selected), Report, and Administration. The main area shows a list of reference letter requests with columns for 'Add', 'Filter (0)', and a list of items. The selected item is a 'Reference Letter Request' from Robert Ryerson, Financial Analyst. The detailed view on the right shows the request content, including a body of text and a list of actions: 'Reply to Rob that you are delighted to serve as a reference for him.', 'Forward to Jordan (your admin) and ask her to draft the initial letter.', and 'Reply to set up a time to meet with Rob to explore why he is leaving the company before committing to writing him a letter.' A feedback button is visible at the bottom left of the interface.

Custom by Capsim



- **Skills:** Insert the skills you want to assess with relevant context
- **Scenario:** Write the role introduction to set the scene
- **Characters:** Input additional stakeholders the learner will interact with
- **Inbox:** Create the situations and interactions the learner will encounter

Results

'Custom by Capsim' Simulation

- 45-minute, custom scenario to assess PMs at multiple levels
- Set directly in a fictionalized version of company
- Developed in under 3 months with I/O Psychologist and SMEs

Outcomes

- **Highly relevant experience where learners can practically apply knowledge**
- **Instant data on the skills that matter most to the Program Manager role**
- **Now under consideration to be modified into a hiring tool**

Inbox Simulations: In Summary



- Immersive learners in authentic, real-world experiences
- Accurately assess performance with empirical data
- Provide instantaneous and individualized feedback
- Create an action plan to develop skills needing improvement
- Repeat assessment to catalog longitudinal development

Special Offer: Enterprise



Instant access to the “Leadership Development Series”

- Business Management
- People Management
- Ethical Decision Making
- Time Management

Access to the CapsimInbox Authoring Platform

Create your own Inbox Simulations

Don't want to build? Consider 'Custom by Capsim'

We can partner to deliver a custom simulation in no time at all!

Test it out totally risk-free 30-day pilot!

**Thank you for
your time!**

Interested in learning more?

- “[Test Drive](#)” any of our Inbox Simulations
- Custom Consultation on how we can assist
- Explore the CapsimInbox Authoring Platform



Chat with Matt
Meeting Link



CAPSIM® 

Matt Shell | 312.477.7271

matt.shell@capsim.com