

1. What specific learning objectives or key takeaways should employees have after completing the micro-learning resource on Restricted Stock Units (RSUs)? I like to complete the classic phrase – “At the end of the module, participants will be able to:” (using Bloom’s taxonomy or the method you prefer).

A. For the sake of this exercise, assume that the learner is a recent college graduate employee with no or little knowledge about stock awards who will participate in the year-end performance appraisal process for the first time (and receive their first year-end stock grant as an Intuit employee). The micro learning should unpack the core concepts of restricted stock units in order to understand what they are, how they work, and the compounding effects of year-over-year stock grants (i.e., assuming an employee starting their third year has received stock grants the prior two years, they will have overlapping vesting schedules based on the amount awarded). Stock is one part of Intuit’s compensation packaged, along with base pay and short-term incentives such as performance bonuses.

2. Is there any existing data or are there insights from previous engagement surveys that could inform the design of this new approach? Do we know what learners liked and found useful?

A. Learners have shared in past surveys that they like the comprehensive yet concise format, and found useful any practical examples of employees like them.

3. Are there any common misconceptions or frequently asked questions about RSUs that should be addressed in the content? What are the pain points? What does the compliance/legal team need us to share?

A. A common FAQ about restricted stock units is about when the grant will begin vesting. Also, many employees don’t fully understand how stock grants fit into their total compensation package (i.e., as a long-term incentive that is awarded based on their job performance in the year).

4. We talked about the wide array of platforms available, but are there any technical constraints or preferences we should consider for delivering this content?

A. For this exercise, the format preference is video, e-learning module, or other interactive resource that would be accessible via our LMS.

5. Do we know what factors have contributed to the fluctuating engagement rates (30%-50%) for historical training on this topic? That can help us address these in the new design.

A. Past materials have covered multiple related topics either in one or two long e-learning resources (be it a collection of voiceover slide videos or “click next” style of e-learning) or live instructor-led “workshops”. Research our team has conducted in the past shows that employees don’t prioritize learning or training because they don’t have the time, their manager doesn’t reward them for taking learning/training, and/or they don’t know where to find the materials (so they give up looking and contact our HR help desk). Those who

engage with learning and training materials have shared that they are not engaging or personally meaningful. To enhance engagement, we want to explore delivering shorter-form content that is as personalized as we can make it (for this exercise, personalizing based on employee tenure).

6. How will success be measured beyond the semiannual engagement survey? Are there any specific metrics or indicators we should consider incorporating into the microlearning resource itself?

A. Evaluating resource effectiveness will be a combination of three metrics: 1) engagement with the resource as a % of the employee population in question; 2) a knowledge check of your recommendation, and; 3) a decrease in employee contacts to our HR help desk (which are normally routed to the appropriate SME who's best able to answer the question).