Tactical Guideline: Six Essential Tips for Getting Started With Virtual Environments

Carol Rozwell, James Lundy, Marti Harris

Numerous lessons have been learned from successes and failures in virtual environments (VEs). We review six essential factors that need to be addressed to ensure a successful pilot project.

Key Findings

- It can be a very intimidating experience the first time a user tries to log on to, or use, a VE. Taking time to get people used to interacting in a VE is critical.

Recommendations

- Have a specific objective in mind for the pilot project.
- Don't try to do all the development yourself.
- Offer participants training to enable a faster start.
- Ensure that people behave professionally.
WHAT YOU NEED TO KNOW

Many factors need to be taken into account when starting to use a VE for business purposes. Setting clear objectives, establishing proper access and creating guidelines for employee behavior are some of the most important ones to be addressed so that companies gain the maximum advantage from the pilot projects they run.

ANALYSIS

VEs such as Second Life have become quite popular in the past 18 months, partly as a result of ongoing public relations efforts and the use of these environments on television shows including CBS's "CSI." Because of this popularity and as enterprises have seen competitors "hyping" what they have done, users in an enterprise often want to pursue a VE-based project and rush to try to get something set up. Early adopters have used VEs to simulate crises to train personnel, create a trade-show environment in which prospective clients can test products and talk with salespeople, and hold team "meetings" in which remote employees can get together virtually. But using a VE, let alone running a project that involves using a VE, is easier said than done. This document outlines six essential factors an enterprise needs to consider to ensure a successful pilot project.

Set Specific Objectives for Pilot Study Participation

Pilot projects are important for testing things and for seeing what the experience is like. Having an objective for a pilot study is important as it sets the tone for what will happen and suggests the metrics that should be collected to measure the return on investment. Despite the initial allure of flying around in a 3-D VE, most employees will tire of the concept unless they experience a demonstrable benefit to their work activities. Having a clear objective will also help determine the features required during a pilot study and simplify vendor evaluation. Examples of pilot project objectives could be to:

- Determine the feasibility of using a VE for employee onboarding.
- Test whether VEs increase learning retention when used for simulated training.
- Ascertain whether VEs can reduce the amount of money spent on trade shows.

Objectives like these are clear and concise. Because they are focused, some clear steps can be determined as key activities in the project. One could be to determine whether employees, partners or even customers would view the enterprise's participation in a VE as important or as a differentiator.

Another valuable practice is to appoint both a project owner and a project champion when creating a pilot study to test the VE. The goal is to ensure that the pilot project has appropriate support and visibility, and that what is learned from the time, money and effort expended is captured.

Establish Proper Access

One of the first things to do when running a pilot project is to ensure proper access. The platform of choice today is a PC, with either Windows or Macintosh OS. Equally important is the choice of graphics support. Because of limitations with some VEs, enterprises should validate what the requirements are for the VE being chosen and ensure that the users selected to participate in the pilot project are properly equipped.
In many cases, the memory and graphics requirements for VEs may exceed those of the standard-issue PCs used by information workers in most enterprises. In general, business-class PCs may not have enough power if only the basic configuration is purchased. And access to some VEs, such as Second Life, requires a specific graphics card — for more information, see: "Three Challenges That Enterprises Face in Using Second Life."

At a later stage, enterprises may need to adapt their configurations if VEs become used in more than a pilot project. Gartner expects that, as they evolve, VE products will be able to support a wider range of devices, such as mobile clients. But for now, this is an issue that must be explored with the technology providers under investigation for the VE pilot project.

The richer graphic applications that include VEs are demanding more from PC platforms. Adding a higher-end graphics card and more memory is money well spent, both for applications and for more demanding operating systems, such as Microsoft's Vista.

Set Behavior Guidelines for Those Representing Your Enterprise

Companies create a code of conduct as one means of ensuring their employees project an appropriate image of the corporation when they deal with people outside. Organizations that will perform business activities in VEs need to review their policies and create guidelines for interaction in a 3-D world. These guidelines can be very similar to those used in real life. Professional behavior in VEs is as important as maintaining professional conduct when acting on behalf of the company in the physical world. A simple approach to this is to adopt all the guidelines you have for professional behavior when on company business. Employees who identify themselves in a VE as representing your organization need to conduct themselves properly. Before going public with any business presence in a VE, enterprises must establish a code of conduct for company avatars. In fact, enterprises may want to stipulate that the avatar for which they are paying is the property of the company.

Ensure Privacy (When Needed)

When using a VE that is not self-contained — for example, a public VE such as Second Life — ensuring privacy on your VE project is important, at least until you are ready to establish a public presence. This is particularly true when the VE is used to perform sensitive business activities, such as bringing new staff on board. In such situations, buying a private server (also called an "island") is advisable.

Enterprises that have used a public VE have often bought private islands and, when they were ready to "go live," have then made some of those islands public. As with any product or Web site launch, a business presence in a VE is a reflection of the company itself and must be treated with caution.

Don't Build It Yourself

Use third-party developers, such as outsourcers, to help build a presence in a VE or to help produce an event in one. Don't try to do it yourself, unless you have staff with the expertise and time to do it. Developers with game development experience are ideal for the job.

Holding events in a VE is a great way to inject an element of "cool" into a stodgy corporate image. However, don't underestimate what it will take to do this. In terms of a budget, an enterprise could spend $100,000 on a marketing launch in a public VE. But often once one event has been held, the company can do a repeat event at minimal cost, as the necessary islands and buildings are already in place.
As with other development environments, expertise will be acquired in-house in time. Even then, look at time-to-market and cost factors when deciding whether to develop or customize a VE yourself or pay a third party to assist.

**Offer Training for Those Who Need It**

There is always a learning curve involved in understanding how to navigate and use a VE. Users who are not comfortable with a video-game-like interface often throw up their hands in frustration. Early implementers of VEs have found that it often requires a serious commitment on the part of users to learn how to interact in the 3-D world. Current tools used in many organizations are designed for a 2-D environment, so appearing natural in a VE takes some practice.

Training is often overlooked and people don't want to spend the time required to learn to use VEs. The technology providers that offer tools for VE development also provide training on how to participate in these environments once they are set up. Organizations should take advantage of this training. One approach that has been used successfully by some companies is to offer their own specific sessions in VEs, so training can be provided in a private corporate setting, such as a private island.

**Tactical Guidelines**

- Set specific objectives for pilot study participation.
- Establish proper access.
- Set behavior guidelines for people representing your enterprise.
- Ensure privacy is available when needed.
- Don't build the VE yourself.
- Offer training for those who need it.