# SHELBY HACALA

## Case Study: CORPORATE TRAINING



### About Shelby Hacala

Shelby Hacala is a serial entrepreneur and professional Business Coach. He is also a Certified EOS Implementor, YPO Forum Facilitator, and EO Forum Facilitator. Shelby routinely works with business leaders and entrepreneurs to implement simple, real-life tools that help them achieve their goals and objectives. This process involves working with clients to refine their vision, implement EOS Traction Tools, execute their strategy, and evaluate their progress. Shelby's clients range from startups to companies with annual revenues exceeding $100M.

### The Challenge

Conducting sessions in-person was critical for creating an engaging environment that challenged his clients to think differently. These sessions relied heavily on physical media, such as printouts, flipcharts, and whiteboards, with each playing a critical role. When the pandemic forced Shelby to work remotely he had to cobble together multiple applications just to have the basic functions he needed, like drawing, capturing feedback, sharing his workbook, and taking notes.

Switching between all of these applications was distracting to his audience, made it difficult to engage with the material, and ultimately limited the free-flowing ideation that is so critical to his process.

### The Solution

Facilitating his remote sessions with Reactiv SUITE allowed Shelby to create a focused and engaging online environment for his clients, with all of his material instantly accessible inside his workspace. Without changing any of his original material, Shelby was able to adapt his presentation and facilitation style to leverage Reactiv SUITE's capabilities and create a more productive and collaborative experience for his clients that goes beyond what was previously possible with pen and paper.

With Reactiv SUITE, Shelby has created a remote learning environment that is closer to an in-person meeting experience than any of the traditional tools he previously used had been able to produce.

"The way we are now running our remote sessions with Reactiv SUITE really does feel like my clients are in the room here with me."
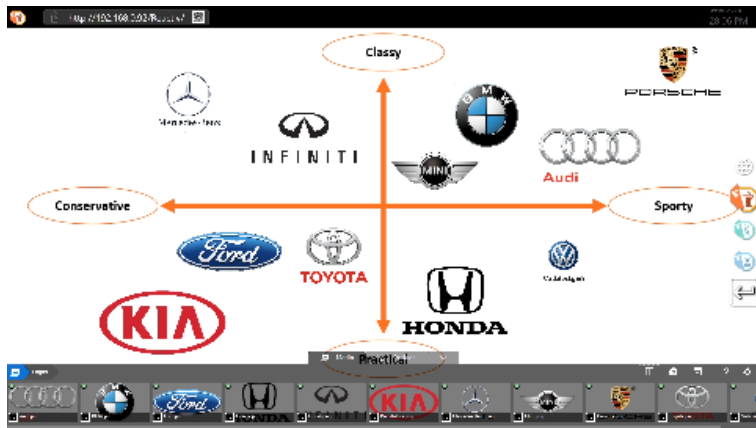
**- Shelby Hacala, Business Coach**

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## Shelby's Requirements Were Clear

1. Shelby needs to lead meaningful and challenging discussions over full-day sessions; access to multimedia content, in-app note taking and feedback capture, and a non-distracting UI are critical

2. The original content cannot be modified to adapt to the software; all material must be instantly accessible and displayed in it's native format in a clear, organized manner

3. All work must be stored between sessions, and captured in a way that can be shared with clients at the end of the process
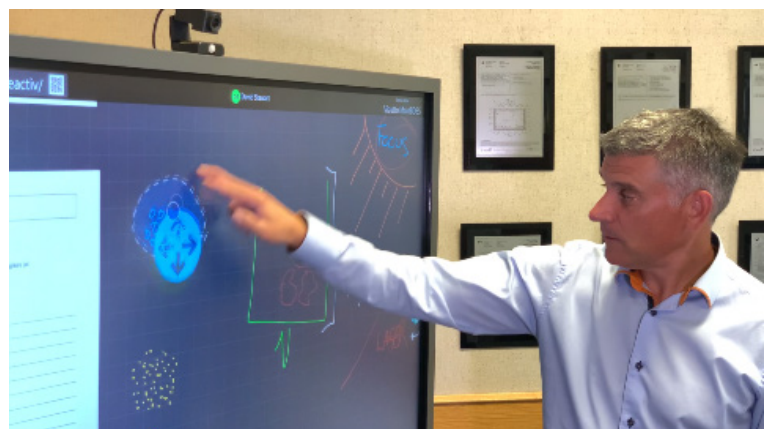
## Interactive Storytelling

With Reactiv SUITE, Shelby seamlessly recreates the exercises he previously performed with his clients using pen and paper or a whiteboard, except now he adds new interactive elements to deepen his client's level of engagement and help them think differently about the subject in question.



By adding a simple background Shelby instantly creates a unique environment where different items are brought ontot the screen and his clients debate their relative value. The flexibility to move items adds a new dimension to the exercise, giving clients the ability to reconsider previous decisions and evaluate different configurations as Shelby offers questions and guides the conversation. Incorporating multimedia elements adds even more depth to the exercise, expanding what can be considered and compared beyond the limitations of the traditional whiteboard he previously used.

When Shelby is leading the discussion, he manipulates and moves elements of his diagrams and animations around the space to visually communicate his ideas. These simple, interactive elements have allowed Shelby to create a more dynamic and collaborative remote learning environment where his clients can engage with the material, and each other, in ways that would not be possible without Reactiv SUITE, all without changing any of his original content.
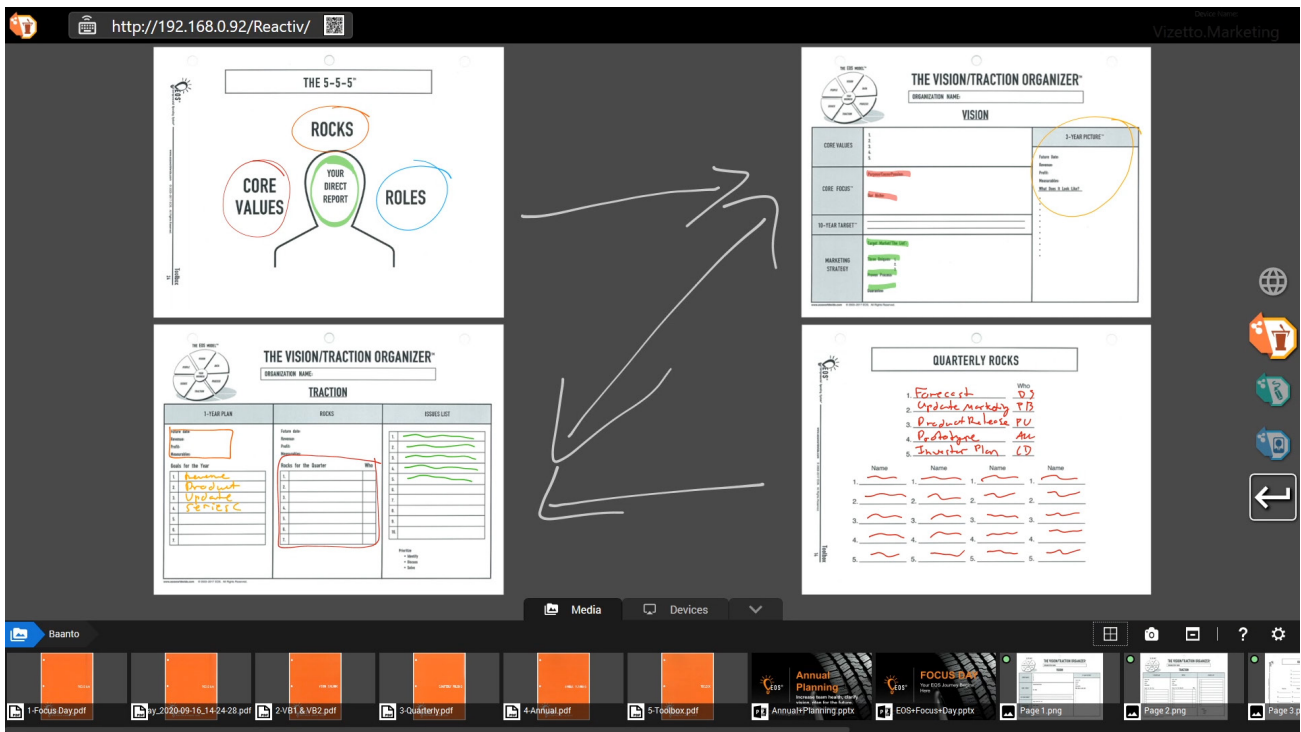


**Watch this <u>video</u> to see how Shelby creates a collaborative and engaging remote learning environment to help his clients think differently about their business.**

### Reactiv SUITE

# All Your Content, All In One Place

Maintaining an active, engaging environment for his clients is critical not only for holding their attention over the course of several hours or days, but also for encouraging the challenging and collaborative discussions that are important parts of the process. These sessions often incorporate multimedia content to support the discussion and drive creativite problem-solving.

With STAGE, the digital table in Reactiv SUITE, Shelby has instant access to all of his files and can open any piece of multimedia content in its original format without leaving his workspace. As additional content is added he continuously organizes all of the objects on screen with the push of a button. Clearly displaying multiple pieces of material on screen, and focusing on how they are related, has opened up new possibilities to highlight relationships between exercises and visually communicate important concepts. As the discussion progresses, Shelby uses the Native Inking feature to draw directly onto each object; filling out forms, recording feedback, and capturing notes without breaking the natural flow of the conversation.



During the session, Shelby uses the Native Inking feature to draw directly onto each object; filling out forms, recording feedback, and capturing notes without breaking the conversation's natural flow.

When each piece of material has served it's purpose, a copy of the document is seamlessly created on the server with all of the markup and annotation he and his clients have created, allowing Shelby to move swiftly through the material without thinking about managing his content or losing the work from that day's session.

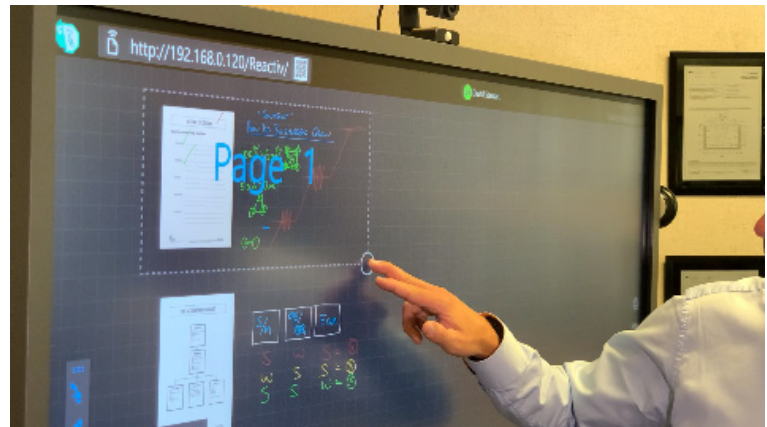Reactiv SUITE

## Keep The Focus On What Matters

Each of Shelby's sessions generates a significant amount of written and visual content, however with whiteboards and flipcharts Shelby had to constantly erase or hide his work after each exercise, and then draw any new diagrams or layouts on the spot while his audience waited. This made it diffiuclt to refer back to previous ideas and cumbersome to move between exercises.



In SCRIBBLE, the infinite canvas app in Reactiv SUITE, Shelby lays out all of the workbook pages for the day's session and draws the corresponding diagrams and animations next to each page. This allows him to move straight into each page's narrative or exercise when he's with his clients, saving him from spending valuable time drawing or erasing, and keeping his audience's attention focused on the story.

SCRIBBLE will also keep Shelby's content and writing on the canvas between meetings, so when Shelby finishes each day's session all of the work from each page in the workbook is recorded and can be easily referenced later on. It is also very important for the work Shelby and his clients do together to be accessible after the sessions have completed. In SCRIBBLE, Shelby uses the Paginate feature to capture the notes and related diagrams from each day's work as a page that will be instantly saved to his server as a PDF.



This allows everyone to stay focused on the material and the discussion, knowing that everything they're doing will be easily accessible after the session is over, and there is no need to summarize the material in a notebook or take snapshots with a phone camera to preserve each day's work.

## Get Started With Reactiv SUITE Today

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