Current Approach to Instruction

Mark Rash | markrash@vt.edu | March 28, 2011

Design

In my role as an instructional designer, I currently spend a lot of time in the design process. During this phase, I perform a number of tasks which typically begin with a project request form that I receive from my manager. This form provides information such as a general description of the project, the sponsor and key stakeholders, the audience, whether existing content can be leveraged or if it is completely new development, and the overall business objectives. Due to the nature of the organization, this form generally indicates that the analysis has already been completed by the business training manager for the segment of the business requesting the project, including a needs analysis and an overall goal statement. At this point, I analyze the learners since, even though they are usually the call center audience that I typically support, specific teams may have their own nuances that are important to consider during the design. If necessary, I also spend time with the manager and members of the audience to assess their performance environment, although this is generally the same and requires limited analysis.

As I progress through the design process, I document my findings in a template that will become the Design Report, which will serve as the roadmap for the rest of the project. In conjunction with the business training manager and/or project sponsor (depending on the scope of the project), I convert the business goals into performance objectives and add these to the Design Report. I also create a high level sampling of assessment instruments and include these in the Design Report. I then create the instructional strategy, with a complete breakdown of how the information will be organized, time estimates, mapping of objectives to specific content presentation, and inclusion of high-level assessments. Once I complete the draft, I send the Design Report to the business training manager, who will meet with the project sponsor to seek approval. The report may go through a few iterations and eventually must be approved by the sponsor before the project will proceed.

There are a few problems that sometimes arise during the design process. First, because the project sponsor or business process owners may not understand all the nuances of teaching and learning, they sometimes ask for changes to be made that may make business sense but are not necessarily instructionally sound, or they may request the addition of topics that cause the project to continually grow, perhaps going outside scope or altering the instructional purpose. This is not to imply that the sponsors or subject matter experts (SMEs) should be experts in training – that is the training team's job – but it can complicate matters, especially if the training team hasn't worked with a particular sponsor or SME in the past.

A second problem that has arisen from time to time is when too many SMEs are asked to review the Design Report. Differing opinions, especially in a high-stakes project, can lead to battles that don't necessarily accomplish anything from an instructional standpoint. This can also result in a delay of the entire project due to delays in approval of the design. I attempt to solve both of these problems by working closely with the business training manager in an effort to manage expectations from the project kickoff to the final signoff. I usually schedule a kickoff meeting during which the business training

manager and our partners establish roles and expectations, as well as provide an overview of the ADDIE process for those sponsors and SMEs who may need it. I also work to solve these problems by applying the principles of design that I have learned during my time in the ITMA program.

As a result of my ITMA experiences, I have achieved a number of successes in the area of design. On a number of projects over the course of the last year, I have employed a complete design process that gave much clearer direction for development than I would have previously used. This was helpful in ensuring the planned training would align with business objectives before the development began. It was also helpful because these projects were so large they required team collaboration – with the team members relying on a single design, we could achieve consistency as we worked on our assigned tasks. This has proven successful on the last several projects completed in this fashion and I feel I have ITMA to thank for those successes.

My current approach to design is significantly different from my previous approach. Whereas previously I focused on design primarily in terms of the look and feel of the training and the topics it should include (which are still important factors today), now I go well beyond these factors and design instruction with specific performance objectives in mind. Previously I wrote assessment instruments at the very end of the project after reviewing back over the content a final time; now I do this at a high level up front as part of the design process. This allows me to communicate to the project sponsors how I intend to measure learner success. Additionally, the more detailed design serves as a guide throughout the development process. Now that I understand the importance of design, I can work with my business partners to explain its importance to project sponsors and SMEs so that they can see the Design Report as the blueprint for the instruction and a representation of the final product.

Develop

In my current approach, I work through the development process by using the blueprint created during the design to build the training product. Once the design has been approved, I use it to develop the instructional solution. To meet the business requirements and the needs of my call center audience, I usually develop materials in the form of HTML documents that are housed on the corporate intranet. I use existing templates to create materials that are consistent with the standards of the department impacted by training, as well as the overall design standards of the organization. I use Adobe Dreamweaver for most of the web editing, for managing the local copies of the content, and for synchronizing local content with the remote site. I use Snagit to create and modify screen captures and other visual aids, as well as Photoshop and Photofiltre for editing other visuals. When a project calls for it, I may also use Adobe Flash, Adobe Captivate, or Articulate to create multimedia learning components or even complete courses.

Just as in my previous approach to instruction, I continue to run into the problem of complex business processes that would mean little to my audience in their initial form. I continue to solve this problem through the use of information mapping. As a result of the growth I experienced as part of the ITMA program, I now have additional tools to combat this problem, including a more thorough analysis during the design phase to break down complex goals into manageable units and specific, single-action steps in

order to determine how best to develop the related materials to facilitate learning. This allows me to chunk complex procedures not only in terms of how they are communicated visually and orally, but also in terms of how they relate to specific skills the learner needs to have as a prerequisite or needs to acquire during my instruction. I feel this represents a significant success in this area because it helped me learn how to break down tasks into the actions and verbal information that I can use as a basis for developing instruction that more effectively guides learners to the goal. For example, I recently broke a nearly 50-step procedure into sub-procedures that could be taught modularly without overwhelming the learner and while leading toward the ultimate objective.

My current approach to development is similar to my previous approach in that I still develop HTML and Flash learning solutions, as well as print-based instructional materials from time to time. However, there is a significant difference between my previous and current approach, namely the link between design and development. As a result of the knowledge and skills I acquired through the ITMA program and in working with more senior members of the training department in my professional setting, I now keep the original design in mind and use it as a roadmap throughout the development. Rather than simply referring back to the design at the end to ensure I've covered all of the objectives, I now allow the design to serve as the context in which I develop the learning solution.

Utilize

In my current approach to instruction, I seek ways to ensure my instructional products meet the needs of my learners. Throughout the entire design and development process, I think about how my audience will actually use the materials, whether they are self-paced online materials taken at the associates' desks, or classroom materials taught by a call center trainer. When creating instructor-led training, I think about how the facilitator will use the materials that I prepare for leading the class, as well as how the learner will use the support materials to acquire the new knowledge and skills. As I create the materials for the trainer, such as the instructor guide, I build into the content the vision for how it can be used to help the learners achieve the objectives, and I ensure this is covered during train-the-trainer sessions. When creating e-learning and online training, I think in terms of how the user will interact with the content, but also in terms of how the learner will use the content in order to reach the desired outcome; and I build this into the course.

One of the problems I commonly encounter with regard to utilization has to do with potential inconsistencies across the different call centers. I primarily support the call center audience and my organization has four such centers, each in a different geographic region and each with different trainers of diverse backgrounds. As a result of this, the delivery of the instructional materials that I develop is not always consistent across the four centers, even though they all use the same materials. I attempt to combat this problem by being involved in the train-the-trainer process when possible, by allowing the trainers to review materials in advance of these preparation sessions, and by holding virtual meetings with the trainers to discuss ways they can best utilize materials. In fact, I have recently had meetings with our field training managers, who work directly with the trainers at each of the call centers, as well as with some of the trainers themselves to discuss the vision for how the materials would be utilized in the classroom. I consider this an important success because it helped communicate to the trainers how

the materials are intended to be used, and it helped me better understand what the trainers need from the design and development team in terms of providing them support for facilitation.

In my current approach to instruction, I perform many of the same tasks that I performed in my previous approach. I still apply my knowledge of user-centric design in a way that enables my users to take full advantage of my instructional programs; however I now focus on my audience not only as **users** of the program, but as **learners**. This change in perspective helps me focus on how to design and develop products that will help lead my learners to the goal. It looks not only at how my users interact with instructional products, but at how those products facilitate learning.

Manage

In my current approach to instruction, I continue to apply principles of project management to keep track of the time, resources, people, and budget allocated to each project. I use tools that my organization provides for managing instructional projects, including project plans, which are customizable templates that detail the tasks, resources, and milestones for each project. I communicate project updates to other team members and key stakeholders, as well as the overall training department in our regular meetings. I keep my manager updated on the progress achieved on each project. I load HTML-based instructional projects to the intranet, create keywords, activate links, and communicate their availability to the appropriate learners. For multimedia e-learning courses, I load the final deliverables to the Learning Management System and the course catalog so that the learners can access them when needed.

At times on complex projects, even with formal project plans in place, it can be difficult to keep track of all the moving parts. For instance, on a current, large-scale project that I have been working with two other instructional designers and three contractors to complete, there is a project plan that breaks down all the tasks and assigns responsibility. Constant email communications of updates, questions, and comments over the final days of the development process have proven impossible to control and have made it difficult to manage the complex project with aggressive timelines. I am attempting to solve this problem by communicating final expectations of each individual and working with the business training manager to double-check that all tasks are being accomplished so that we meet our target objectives. I consider this same project an important success in terms of management in the sense that I have learned how to delegate tasks to others (which is not something I would have previously considered a personal strength) and to serve in more of a leadership role while our contractors perform the many of the tasks and I focus my attention on concurrent projects.

My current approach to instruction in terms of management is quite similar to my previous approach. I continue to manage the time, resources, and people required for each instructional project. I manage by publishing and organizing information in such a way that the learners and instructors are able to access and use it effectively for learning. I manage by loading e-learning courses to the Learning Management System and making them available to the learners. Finally, I manage through communication with the project team and key stakeholders.

Evaluate

It is disappointing, but the fast-paced nature of business and quantity of projects with tight timelines generally do not permit an extensive evaluation. In my current approach, I typically include a Level 1 assessment in the form of a quick online survey the associates can take at the end of training. This helps gather the learners' opinions of the training. I also use a Level 2 assessment in most projects, typically as a multiple choice knowledge check. I create the knowledge check by plugging the questions and answers into an online quiz maker that generates the HTML and JavaScript necessary to make the quiz work and to submit the results to the Learning Management System.

The Level 2 assessment takes the evaluation further than Level 1, but it only focuses on learners' ability to recall facts or, perhaps, their ability to correctly answer multiple choice questions, even if only by guessing. This is a common problem because it doesn't necessarily correlate with a change in behavior or performance, which is exactly what each instructional solution intends to accomplish. As a result of the knowledge and skills I have attained in the ITMA program, I now attempt to build behavioral assessments into my instructional products when I have the luxury of doing so. For e-learning pojects, I do this by creating realistic scenarios and providing decision points that allow the learner to select the appropriate pathway through a specific business procedure or problem. On a recent systems-training project, I used Captivate to create a behavioral assessment that requires the learner to perform specific tasks in a simulated environment, evaluating their performance and providing feedback, which I consider a significant success because it moved away from the standard multiple-choice knowledge recalls and required the learners to perform the actual tasks they will be required to perform on the job. For instructor-led training, I do this by creating role-plays that the learners can take turns performing in groups of two with checklists for performance, or fishbowl-style role-plays in which learners take turns performing part of an overall process with the rest of the class and the instructor observing and providing feedback.

My current approach to evaluation is quite different from my previous approach. Prior to the ITMA program, I did not emphasize evaluation enough and at best it resulted in determining what the learners thought about the instructional situation. Now I understand that, while determining the learners' reaction to the training can be helpful, it's really the higher-level evaluations that provide the more useful information about how effective the training is and how it has impacted the business. I try to build somewhat more advanced evaluations into the learning solution whenever possible, however the organization still has room for improvement in the area of evaluating how well instruction transfers to the workplace and what kind of impact it has on performance. One of the problems that I encounter is how to work this type of evaluation into the process when time and resource demands are so great that it is literally time to move onto the "next big thing" by the time such evaluation would be appropriate. I am attempting to solve this problem by working with management to create a more robust evaluation plan that helps managers and leaders outside the training organization determine how well knowledge transfer is occurring and how it impacts the business. This solution is early in development and does not yet cover issues such as how to bring the managers and leaders up to speed on the type of evaluation that would be needed. Perhaps if we can have the managers of the learners evaluate the change in

performance after training, in conjunction with the business training manager, it can help determine how the training may have impacted the business.