Quick Instructional Design

NorthWest Network

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Presenters

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Objectives

- Identify ways ISD can be done faster without sacrificing quality.
- Share your own tips for doing ISD faster.
- Identify what master developers do differently.
- Identify tips for managing projects more efficiently.
- Select tips and best practices worth using in your own work environment.

Presentation Outline

Analysis

Do Needs Analysis When Needed

- Do needs analysis if:
    - The performance problem is not clearly identified.
    - The cause of the performance gap is unknown or you suspect that the cause is something other than not knowing how to do the job.
- BUT needs analysis is not always necessary. Begin with a job or task analysis if:
    - The training goal is clear.
    - Training is required, e.g., regulatory requirements.
    - Target audience is new hires who need to be trained for a clearly defined job.
    - The job involves a new process or product and a job aid or other communication methods will be insufficient to achieve the desired performance.

Use Appropriate Analysis

- Select the appropriate type of content analysis or use in combination as needed:
    - Procedural task analysis for primarily linear tasks such as using software functions and operating equipment.
    - Hierarchical task analysis (or knowledge task analysis) for cognitive skills; especially when involving specific prerequisite learning.
    - Concept analysis to identify critical attributes, examples, and non-examples.

How

- Reuse/adapt previously used processes and tools.
- Use focus groups/teams rather than individual interviews for analysis.
- Include a range of expertise from novice to master performers in a "safe" environment – don't include management representatives on the analysis team.
- Use double-wide flip charts for developing performance models.
- Use stickie notes for displaying and sorting analysis data.
- Use different colors to identify, e.g., different roles.

Preparation

- If you must do interviews (as opposed to focus group meetings), prepare standard questions and include them in a standard data collection instrument.
- Plan templates for analysis and development deliverables while you are developing the project plan; include them in the project plan so the client can see how the deliverables will look.
- At the end of the project planning phase, draft straw models of the development template and have it approved by the client. Consider the template's format as you are gathering data. Better still, as you are collecting data, record it in the development template.

Working with the Data

- Record (audio) interviews and have them transcribed by a court reporting service. Ask for e-file only – tell them NOT to provide indices, etc.
- Or take notes on a laptop.
- Set up keyword categories, search document for keywords, and copy relevant comments into the appropriate file or section (e.g., customer needs; target audience).
- Or transcribe to Word tables (or Excel or Access) and sort as needed.
- Or use a color-coded format for interview notes.

Identifying Metrics

- Look for existing metrics and baseline data.
- Measure when appropriate.
    - Don't spend more on the evaluation system than you expect to gain in ROI.
    - Evaluation systems have a life cycle, just like any other product. You may even want to discontinue an evaluation system.

More Analysis Tips from Our Participants

When collecting analysis data …

- Use brainstorming software tool that enables Analysis Team participants to add ideas anonymously (Vanta).
- Use a mindmapping tool with a projector.
- Use butcher paper.
- Have both a facilitator and recorder in a focus group.
- Use a law margin rule notepad (2 columns – large left column). Take your notes on the right and identify keywords in the left column.

When summarizing analysis data

- Use headings in Word or PowerPoint and use the outline tool to create an outline.
- Enter the filename and path in the footer of each document to identify its location.

Design

- Use a subset of the analysis team to create the design – you won't have to catch them up on what has been done, and they will help sell the design when it's being reviewed.
- Conduct Design Reviews in a meeting format. (See *The Design Review Team (DRT) Process* article at www.SoelkeConsulting.com.)
- Use/adapt an existing design document template. Reuse/adapt any standard items such as the introduction.
- Based on the analysis, plan the key application exercises, then plan supporting learning activities such as lecture, etc. In other words, start with the performance goals and work backwards.
- Use an abbreviated or no design document for a real short course.

More Design Tips from Our Participants

When creating the Design Document …

- On the cover page of design (and other) documents to be reviewed, include contact information in case the reviewers have questions.
- Begin the design review by reviewing key exercises.
- Use an outline as the format for a design document (clients understand them better).
- Use a treatment as a design document (narrative description, content, treatment, rationale).
- Use an ID worksheet (outline) and/or course map.
- Include what happens to the participants as part of the design document.
- Start with critical mistake analysis.
- Record key "aha's" in the design document.

Development

- Create templates before developers start developing.
- Use templates when working with SME's so that there is less rewrite.
- Incorporate existing, appropriate materials whenever possible. Use SCORM compliant materials if available.
- Re-use effective templates and/or directions for various types of learning activities.
- Use an expanded design document for a facilitator guide for limited delivery by a single facilitator.
- Consider using ISD software for development.

More Development Tips from Our Participants

When developing instructional materials …

- If given a template by the client/development team, use it.
- To prevent a template from being changed, create a functional template (using the file extension ".dot" for Word documents or ".pot" for PowerPoint documents. Don't use a "Save As."
- Use styles and teach developers to use templates.
- Turn off automatic update of styles.
- Label templates intuitively.
- Be aware of any difficulties that might result from different versions of Word or PowerPoint. Test the files early in the development phase to see if you'll have problems.
- Use "Autotext" in templates.
- ISD software that might be useful:
  - Leader Guide Pro
  - Designer's Edge
  - SuperFrames (for integrating job aids and learning activities)
- Sources for information about reusable learning objects:
  - www.learningcircuits.org/2002/apr2002/mortimer.htm
  - http://cisco.com/

Developmental Testing

Use Very Small Groups

- The development testing cycle ideally should go through at least 2 revisions.
- It's the number of tests in the cycle that's important; not the number of people in the test. Studies have shown little difference between using 20 people and using 3 people.
- Use several learners to test your course.
- If some high-risk activities require additional learners, make special arrangements to conduct an adequate test.
- If the course is long, conduct a detailed run-through.
- If employees are unavailable, you may be able to save time by hiring people for tryouts. Offer a bonus based on test score to raise the level of motivation to be similar to that of an employee.

Pilot

- Use group consensus technique rather than questionnaires to collect feedback.
- Although it appears to take additional time, debrief with the pilot learners after each lesson so they don't have to recall their reactions to specific lessons at the end of what might be a week-long pilot.

What Master Developers Do Differently

- They think about all the ISD phases at once rather than linearly. The phases are more interconnected.
- They think about the implications that decisions made in one phase have on the phases that follow.
- They do several types of analyses at once.
- Much of the ISD process and techniques becomes automatic for them.
- They reuse templates, content materials, and learning activities and adapt them to match the objectives, content, and audience.
- Their approach is eclectic; they use the approach that works irrespective of the "ism" or discipline on which it is based. They know what works for certain target audiences, corporate culture, reduced timeframes and budgets, particular industries, etc.

More Tips about Master Developers from Our Participants

- Master developers are flexible.
- Master developers don't work linearly.

Project Management Tips

- Predefine team member roles and responsibilities.
- Get the Steering Team's approval at the end of each phase—before going on to the next phase.
- Predefine templates and tools.
- If monitoring/tracking project progress using a high-tech project management tool (e.g., MS Project) takes longer than doing the work of the project itself, don't use to high-tech tool.
- See *Tips and Tricks: Project Planning and Managing Large-scale MCD Projects* article at www.SoelkeConsulting.com.

More Project Management Tips from Our Participants

- Don't skip the kick-off meeting.
- Write a project charter (see Lynne Brooks' new project management book).
- Manage the team. Regardless of the team member's level of experience, the project manager still needs to pay close attention.