

## Instructional Design Principles

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### Instructional Design Principles

Instructional design is a fluid process by which effective and efficient training material can be developed. It is reliant upon identifying a need for training, identifying who will benefit from the training, identifying the context in which they will learn, developing goals, outlining steps to reach those goals, determining how to assess if learning occurred, setting objectives to reach the goals, creating an instructional plan to meet the goals, and determine the best method to deliver the training. Eliminating any one of these steps in the process of instructional design could result in ineffective training or miss-utilization of resources.

Understanding the need or identifying the root cause of an issue will help the designer to create a training that will address the issue directly rather than addressing an outcome of the real issue. This will save time and money for the company because additional trainings will not be necessary. Delivering the best training the first time will also help prevent confusion or resistance from the learners because they will not feel like they have been given conflicting or unclear information. This will allow the learners to address the situation and provide the customer with the expected level of customer service. For the business scenario it is important to understand why the sales associates do not feel they are getting quality feedback and what barriers are in place that prevents the managers from delivering quality feedback. Knowing these two things will help to design a training that specifically addresses the skills the managers need to develop to meet the needs of their sales associates (Piskurich, 2006).

There are a several probable gaps, or needs, in the sales manager scenario; first the newly promoted managers may need to be trained in managerial skills. However, since the survey is indicating a more company-wide issue existing managers and newly appointed managers with previous managerial experience may need additional training to refresh their coaching skills.

Regardless of managerial experience all managers should be coached on their coaching skills to ensure they are meeting the needs of the people they lead. Other areas to review in a needs assessment would be to look at the company culture to see if it is contributing to the lack of managerial feedback to sales associates. Also an analysis of the managers' work environment and responsibilities could help identify further causes to the issue. Looking in these areas would identify a skills gap, if the managers do not know how to coach, a motivational gap from the company culture, environmental gaps from the work environment, and communication gaps also from the work environment (Dirksen, 2012). To determine exactly where the gaps are a performance gap assessment would determine why the managers are not providing the feedback their sales associates need (Piskurich, 2006).

Understanding the context of the learning will ensure the learning is delivered in a manner that will reach the learners and be adopted by the learners. It is important to understand the context to design the right training using the best methods while managing budget parameters. In this scenario understanding that there are managers with different skill levels attending the training would help to design a more rounded approach. For example, rather than having a lecture based training it may be more appropriate to have a facilitated training that allows the learners to share experiences, learn from each other, and practice new techniques. This approach would provide the least experienced learners with the information they need and reiterate the skills of the most experienced learners because they will be demonstrating their skills (Dirksen, 2012).

The learners in the business scenario are going to be at different levels of skills for coaching. There will learners who have had little no previous practice, learners who have had some previous practice but are not yet efficient, and learners who are efficient because of

extensive practice. It is important to consider the different levels of skill in designing a training to achieve the goals. The training will need to be able to reach all three levels simultaneously without being confusing for the managers with no previous skills and without being dull and repetitious for the managers with well-developed skills (Dirksen, 2012).

Learning characteristics will affect the way learners approach learning and their overall attitude toward the learning. It is important to know how much knowledge and experience the learners have, identifying what motivates the learners, and how their characteristics relate to the learning goals (Dirksen, 2012).

In the business scenario the instructional designer will need to create training that is engaging to all learners and can be easily understood by the learners without shutting learners down for not instructing to their needs. By identifying the distribution of experience in each training location the designer can look at creating a training that will include interaction of the learners where more experienced learners can share their knowledge and expertise with less experienced learners. This will help to create a safe learning environment that is engaging and relevant to all participants. Knowing the difference in the demographics of the group will help to ensure that generational and cultural references are pertinent to the learning group and can be easily understood by the participants. For example referencing a practice from 10 years ago may help some learners to understand a concept but will leave others without the benefit of the connection.

Learning goals outline the expected resolution of the training and how that resolution will affect the gaps identified performance gaps. The results of the needs analysis, context analysis, and learner analysis are needed to develop realistic goals that address the root cause of the

performance gaps. The three types of analysis lay scaffolding for the goals to be built on to achieve the desired results of the training (Dirksen, 2012).

In the business scenario the goals for the learners would be to acquire or improve coaching skills to provide sales associates the feedback needed for development. Also learning the company's expectations and processes for coaching would help the managers create a more standard coaching process for all sales associates. Both of these goals would fall under organizational learning where the culture of the company and how the company adjusts to remain competitive would be the basis for the learning (Gnyawali & Stewart, 2003). Both of these goals would require the learner to gain knowledge of purpose of coaching and develop skills to deliver quality coaching (Piskurich, 2006). When learning the organization's expectations for quality coaching while developing skills for quality coaching the learners are going to be learning this in the context of the company culture. What the learners learn will be adjusted to fit the format and needs of the company. Time management and organizational skills could also be addressed to help the managers balance their workload to create the needed time to coach and develop the sales associates. These are goals that can be addressed through training; additional goals can be set and reached through coaching and self-development. Addressing these goals would address the employees concerns for quality feedback brought up in the survey. By providing the sales associates with feedback the company can expect improved skills and job satisfaction that would be reflected in customer satisfaction and measurable through sales and ROI calculations (Piskurich, 2006).

It is necessary to take the overall goal of the training and identify the steps or tasks that will be necessary for the learner to achieve the goal. Identifying individual steps will help the designer create learnable actions that can be built upon each other to achieve the final goal.

Attempting to train a concept without breaking it down into its simplest steps can cause the learner to become discouraged from the seemingly immenseness of achieving the goal (Yager, 2005).

In the business scenario there would be multiple tasks with subtasks to achieve the goals of providing quality feedback to sales associates (Piskurich, 2006). One task or step would be for the manager to demonstrate constructive criticism coaching which would be composed of three sub-steps including; identifying and sharing what the sales associate did well, identifying and sharing what the sales associate could do better, and assisting the sales associate in identifying how they can modify one behavior to improve their interactions with the customer. A second task would be for the manager to demonstrate congratulatory coaching with subtasks of identifying what the sales associate did well and relaying to the sales associate why that behavior positively impacted the customers' experience. A third task would be for the manager to demonstrate disciplinary coaching with subtasks of identifying when discipline is necessary, explaining the purpose of the discipline to the sales associate, and outlining for the sales associate how behaviors need to be modified to prevent any progression in disciplinary action.

Learning objectives can be developed from the tasks and subtasks outlined to achieve the goals of the training. The objectives serve multiple functions, first they help the learner understand what they are expected to learn from the training. Second they help the facilitator to understand the direction the training needs to take allowing them to keep the learners focused on the correct path of learning. Third they serve as an overview for other stakeholders such as managers, administration, or parents, to understand what the learner will be gaining from completing the training (Piskurich, 2006).

Learning objectives for the business scenario based of the tasks and subtasks identified above would include the following:

1. Managers will demonstrate constructive coaching to sales associates using the “went well, even better” model by the end of this course.
2. Managers will demonstrate congratulatory coaching to sales associates by using the “identify and inform” model by the end of this course.
3. Managers will demonstrate disciplinary coaching to sales associates by using the “when, why, and how” model by the end of this course.

Assessments are necessary to determine if the learner learned and can take different formats. An assessment will help the facilitator, learner, and other stakeholders identify how well the learner gained the knowledge and skills necessary to achieve the goals. Knowledge gained can be demonstrated in written or oral format while skills can be assessed through observation. The use of assessments will help the learner and facilitator to identify areas of opportunity that need reviewed for the learner to master the skills and knowledge necessary to achieve the goals. Assessment is equally valuable to the designer and stakeholders because it can help to identify gaps in the presented information allowing for adjustments of materials to ensure the goals of the learning are achievable (Lambert & Lines, 2000).

In the business scenario to assess the skills of the managers post training it would be best to observe them delivering coaching to their direct reports. This will ensure that they are able to apply the concepts they learned in the training and also provide the opportunity to coach the manager to the correct behaviors. To aid in the observation a checklist with specific behaviors identified and the criteria required to demonstrate mastery of the behavior would be beneficial. A

check list would also help to ensure that the managers are getting consistent coaching regardless of location to develop their skills (Piskurich, 2006).

Using observations guided by a checklist would provide better feedback on the managers understanding and learning from the training. Practicing or demonstrating the skills and behaviors in the classroom will not provide the manager with the variables of working with people and their unique characteristics. Because the training is focused on modifying the managers' behavior it is important to see if the learning has been applied. A paper and pencil or computer based test can check the managers understanding of the principles and history of quality coaching but cannot assess the managers ability to use those skills when communicating with their direct reports.

The instructional plan is the structural framework for the training and is created from all of the previous elements including the identifying of a need, identifying the learners and the context in which they will be learning, setting goals that can be reached by identifying individual steps, setting objectives, and identifying how to assess for skill and knowledge transfer. With the instructional plan the designer will have the outline needed to develop training material that will meet the needs of the learner, address the needs of the client, and utilize available resources efficiently. The instructional plan can be broken down into four sections including; the introduction, the body of the material, the conclusion of the training, and assessment of knowledge and skills. The introduction needs to gain the learners attention, help them identify why the training is important, outline the training, all while increasing their interest in the information to come. The body needs to build off the learners previous experiences, connect those experiences to the new information, identify how the new information will enhance their current practices, provide an opportunity to practice new skills and receive feedback on that



practice. In the conclusion the information from the learning needs to be reviewed, learners need to identify what they have learned, and how they will use that learning to enhance their performance. The assessment will measure the level of knowledge gained and skills acquired from the training. Additionally learners need to have the opportunity to provide feedback on the course itself, this will allow for further development of the material to improve the methods used to achieve the goals of the training (Piskurich, 2006).

For the business scenario an instructional plan can be found in appendix A. This instructional plan will help learners to build on existing knowledge through the use of emotional connection and critical thinking. People better recall information that has an emotional connection than they do ones that do not (Dirksen, 2012). For example if you ask someone where they were on September 11, 2001, they will most likely be able to tell you not only where they were but what they were doing and how they reacted when they learned of the terrorist attacks in New York City. If you ask a person to tell you what they were doing on June 1, 2013 most will not be able to explain what they were doing or where they were. They may make a guess at their activity based of their habits but would not know decisively with details the activities of that day.

Connecting the learning with the participants existing knowledge will help them to recall the information later (Dirksen, 2012). People can more easily add new details to existing knowledge than process and store new skills. For example a person learning how to cook may need to review a process before beginning a recipe that they have used once or twice before. While an individual with established cooking skills only needs to understand the difference in the process from the way they have been doing it to the new method to attempting it in a recipe.

Critical thinking of how to apply the learning in different situations and practicing that learning will challenge the learners to help them create those new memories (Dirksen, 2012).

Applying the skills or assisting others in applying the skills to established or familiar situations will help increase the brain activity that will result in stronger memory recall. Learners who learn how to relay new information without applying it often are not able to apply it in the future. For example a person can understand the driving laws and the concept of operating a vehicle but until they actually sit behind the wheel and maneuver the vehicle they cannot apply the knowledge. It is the application of the knowledge in the context of its use that will help the individual learn how to drive and not just reading a manual and passing a test.

The delivery strategy needs to be considered throughout the process of creating the instructional plan. It is important to know what means for delivery are available as well as what forms of delivery will best suit the needs of the learner and the stakeholders while achieving the goals of the training efficiently (Piskurich, 2006).

The method for the business scenario training will be facilitated self-instruction because the learners need to build off of their existing knowledge. This will also provide a cohesive learning experience with participants with different levels of coaching skills (Piskurich, 2010). Media for this learning will be limited in need. Objectives will need to be posted on a white board, flip chart poster, or with a projected power point slide to make the plan for the course visible and allow for the participants to gauge where they are at in the training. A white board or flip chart posters will be necessary for the learners to outline behaviors during discussion. For the role play portion a job aid with a diagram of the correct coaching model could be distributed for quick and easy reference. The participants can then take the job aid with them to assist in their coaching process (Piskurich, 2010).

There are numerous ethical and legal considerations to consider in the design process and are outlined on the IBSTPI website in the “Code of Ethical Standards for Instructional

Designers”. All of these considerations need to be reviewed and followed by the instructional designer to ensure that the designer and the field do not endure any loss of character in the perception of the client. Clients need to be able to trust fully the ethical and legal responsibility of the designer to maintain the integrity of the field (Spector, n.d.). Three of the many ethical considerations are outlined in this paper.

One area of ethical consideration for a designer would be to provide efficient and effective training that is within budget and is a solution that would not cause the client any unnecessary expenditures and resources is an ethical concern for a designer because the client is trusting that the designer will not be wasteful in the creation of the training. To use resources wastefully puts the designer in a position for the client to no longer trust them. A lack of trust between design and the client can negatively impact the field as a whole therefore it is important that designers produce materials that will meet the objectives in the most cost effective manner. In the case of training managers the designer would need to consider the costs involved with the creation and delivery of the training, identifying what expenditures are absolutely necessary and which ones have more cost effective alternatives. Businesses need to maintain a profit to be successful, should a training design negatively affect the profitability of the business then it is possible the business would need to close, an end result that is not financially desirable for the client or the designer (Spector, n.d.).

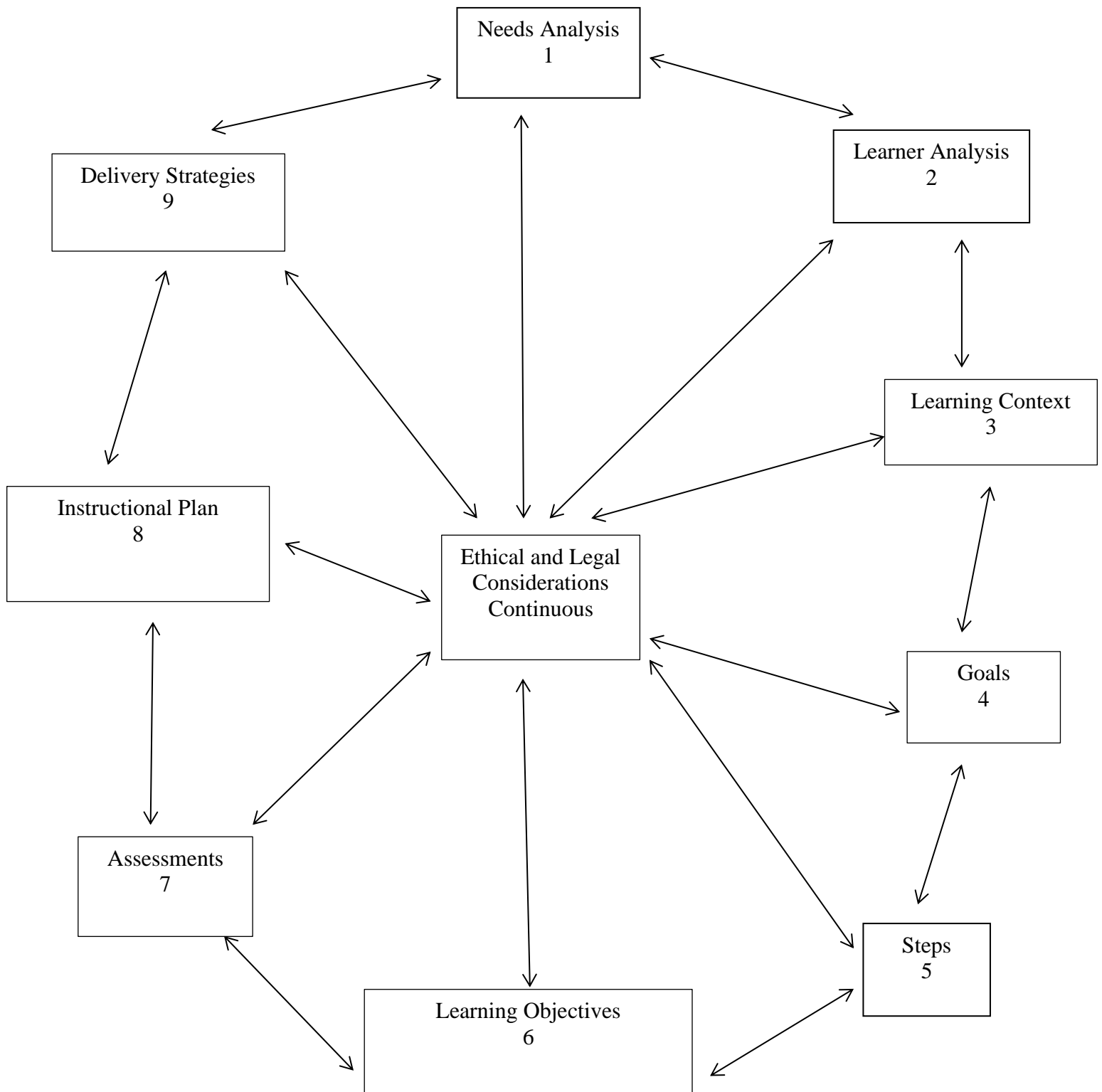
A second area of consideration would be supporting humane and socially responsible goals are an ethical necessity for a designer. Assisting the client with a design that could be used to train for inhumane practices or socially irresponsible practices would create distrust for future clients and design. Each designer needs to uphold legal and ethical practices that will result from the design of their material to maintain the integrity of the profession. This is a consideration in

the training of retail managers because it is important for the reputation of the company for the manager not to become overzealous in obtaining business goals by using ethically questionable sales practices. Each employee needs to be coached on how to work with customers and gain interest in products and services without misleading, misrepresenting, or omitting information that could cause the customer to decide against the offer. This is a sound business practice that will encourage customers to return. It is important to outline the negative consequences to ensure that the long term results of questionable practices would be detrimental to the success of the company for anyone who thinks that obtaining the sale is the most important part of the interaction with the customer (Spector, n.d.).

A third area for an instructional designer to consider would be protecting the privacy of the client is essential in maintaining the trust of the client. The trust the client puts into a designer should not be misused because of the negative implications that misuse could have on the profession. In the case of the manager training one thing the designer would need to include is that the trainer needs to remind the managers not to include names of people involved in the scenarios that they share with each other. This will protect the employees privacy and also protect the employee from bias should another manager work with the employee after the training. This is a concern because even if not intentional relating a scenario using a persons' identity will create presumptions based off of the perceptions of the story teller. These presumptions can negatively affect the employee if they are required to work with a manager who has heard about them. A manager needs to be able to work with and draw conclusions based off of their interactions and observations with an employee to ensure that the employee is provided with fair and equal treatment (Spector, n.d.).

The instructional design process is intrinsic and relies multiple variables for its success. A designer will be the most successful when considering all of the elements of the instructional design process while maintaining ethical and legal integrity.

Instructional Design Principal Concept Map



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## Appendix A

### Instructional Plan

**Goal:** The managers' goal for this training is to acquire or improve coaching skills to provide sales associates the feedback needed for development.

**Type of Learning:** Though knowledge is needed for understanding the reason the actual learning to achieve this goal would be the acquisition and development of skills.

**Objective:** Learners will be able to apply celebrational coaching when appropriate to develop consistent customer service within their store location by using the coaching methods job aid distributed in training immediately following the training session.

### Introduction

- Activate attention – The trainer would come energetically into the room giving all participants high fives and verbal snaps such as, great job, awesome, fantastic, or wonderful. This would take the learners by surprise because it is not a traditional method for starting training and make an emotional connection because people feel good when they are complimented (Dirksen, 2012).
- Establish instructional purpose – After the attention grabber the trainer would then ask the participants how they felt when greeted with an energetic kudos. Expected response would be excited, good, or happy. This would open the trainer up to explain this is how people like to feel when they are working and doing a good job but often need feedback to know they are doing a good job to feel that way. This would make an emotional

connection for the managers to understand that just like they like to feel good about the work they do then their employees would like to feel good as well (Dirksen, 2012).

- Arouse interest and motivation – The trainer would open up a short discussion of how feeling good about doing a job correctly how the feedback recognizing the good work encourages them to continue to be productive and do well. This will make a connection to personal experiences the participants have as well as continue to engage an emotional response (Dirksen, 2012). The trainer can then lead the responses of this discussion to a connection that the participants' direct reports would respond in the same way. From there the trainer can get the motivation from the managers by getting them to explain this would increase productivity, customer satisfaction, and their stores' performance overall.
- Preview lesson – The trainer could then provide a brief overview of the training by explaining the objectives as they are listed on a slide or on a poster. This will provide the learners with an outline of what to expect and a visual reference to refer to so they can see if they are on track with the training.

## **Body**

Participants will be divided into groups of two or three for the main portion of the lesson. This provides a safer environment to volunteer information in and will set the stage for practice and peer feedback as the main learning tool in the training (Dirksen, 2012).

- Recall prior knowledge – Participants will be asked share successful coaching moments of celebrational coaching by sharing the situation being coached, how they coached, and the outcome for the sales associate from that coaching in their small groups. This will help them to build the learning from the training onto existing knowledge that they use on a daily basis already (Dirksen, 2012).



- Process information – The trainer will build off these experiences by asking the managers to generate a list of scenarios they would provide celebrational coaching for in their small groups. Having the managers share in smaller groups will help to build the trust they will need for the role plays as well as encourage more participation because a few of the participants will not be able to take over the class conversation (Dirksen, 2012).
- Focus attention – While still in the small groups the trainer will open up the conversation to have all the groups share their ideas on scenarios they would use celebrational coaching for. This will expose the participants to ideas and experiences that they did not share in their small groups while maintaining the safety of a small group.
- Employ learning strategies – As the groups share their scenarios the trainer will ask them how to approach each scenario and outline key behaviors on a poster or on a white board. Outlining the behaviors will help the managers to become cognitively aware of what they do and say to create a positive coaching environment. It will also provide them the opportunity to learn from the experiences of their peers (Dirksen, 2012).
- Practice – The participants will now work again in their small groups roleplaying a series of two or three scenarios where they would apply celebrational coaching. The managers need to each take a turn at coaching. In each scenario the third person or the coachee will provide feedback to the coach on what went well and what would have made the coaching better. The trainer will move throughout the room during the role plays to provide immediate feedback on the demonstration of the managers skills. This will give them immediate feedback in a safe environment and allow them to relate to their personal experiences that they shared earlier in the lesson (Dirksen, 2012).

- Evaluate feedback – In each scenario the third person or the coachee will provide feedback to the coach on what went well and what would have made the coaching better. The trainer will move throughout the room during the role plays to provide immediate feedback on the demonstration of the managers' skills. Feedback will need to continue post training from the managers' supervisors so that they can continue to develop their coaching skills. Because this is a skill development training it is important that the skill is observed, praised, and corrected in an ongoing practice to help adjust to changes in the work force and company practices (Dirksen, 2012).

## **Conclusion**

- Summarize and review – After the managers have completed the role plays the trainer will start a conversation with how the managers felt about the coaching process.
- Transfer knowledge – The second part of the conversation the trainer will lead the participants from how they felt about to what conclusions they can draw from their practice and what do those conclusions mean.
- Remotivate and close – The last part of the final discussion the trainer will have the participants discuss how they can use their conclusions in their stores and what key concepts have they gained from the learning. These steps combined together will connect the emotional responses to existing knowledge and new knowledge while requiring them to think critically about the processes of coaching and how to use them effectively (Dirksen, 2012).

## **Assessment**

- Assess performance – Performance assessment will be ongoing by the managers supervisor observing the manager providing coaching and providing the manager immediate feedback on that coaching.
- Evaluate feedback and remediate – The overall effectiveness of the training will be evaluated in the follow up survey of employees. This will measure if the objective of providing better developmental coaching has been met (Dirksen, 2012).