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# A Qualitative Exploration of Instructional Designers' Transition from Preparation to Practice

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Transition from Preparation to Practice



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ABSTRACT

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Much of the recent instructional design (ID) practice research can be parsed into three key categories: ID professionals, ID preparation, and the isolated differences between novice and expert designers (Sugar, 2014). However, not one of these three categories examines the *transition* experience of ID practitioners from their preparation to practice in the world of business.

The purpose of this qualitative study was to gain further understanding of the practical lived experiences of five instructional designers in their first years in the business world as they negotiated different sets of expectations placed upon them. Interpretative Phenomenological Analysis (IPA) was used to analyze interview and artifact data, collected over two years. Woven together, these data tell the collective narrative of the participants' transition story. The findings of this study resulted in eight themes and several subthemes. The most salient finding was the discovery of the ID practitioner transformation framework, which comprises the first seven findings. This framework revealed that these participants' transition was not finite. In fact, they experienced a pattern of continuous personal and organizational growth long after their initial transition into the workplace.

In addition to these findings, this study offers transition-related recommendations to multiple stakeholders, including prospective IDs, ID graduate programs, and businesses that hire IDs. Future research could expound on these findings by expanding participant criteria, examining the phenomenon of ID transition from the perspectives of others, and validating the newly discovered ID practitioner transformation framework using a larger sample size.

Keywords: instructional design, phenomenology, job role, transition, transformation, practice

# ACKNOWLEDGEMENTS

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CHAPTER 1

**Introduction**

**Statement of the Problem**

As a novice in the world of instructional design in the business and industry domain, I was sometimes told by non-designers how to perform my craft. Perplexed, I would find myself thinking, *I'm confused. Why did you hire me for my expertise if you are going to tell me how to perform my role?* There may have been other reasons, such as job fit, but my frustration seemed to originate from conflicting job role expectations—my practical day-to-day work did not mesh with the services that I felt formally trained instructional designers (IDs) ought to provide. As I shared my experience with fellow IDs, I felt nearly unanimous resonance and empathy from them. This phenomenon of IDs experiencing role confusion in their work appeared to be a tragically regular occurrence in the field.

When an ID's job expectations differ from how their manager expects the job to be done, one party's needs typically go unmet. It often seems that the unmet needs belong to the ID. Left unaddressed, these needs can compound over time and lead to negative practical consequences for the designer, and eventually for those around him or her. Initial simple frustrations might give rise to job dissatisfaction, and ultimately lead one to pursue new employment.

**Graduate Programs Lack Feedback**

I will follow the data wherever it may lead. However, if this study reveals this clash of expectations to be prevalent among novice IDs, then strides could be made by instructional design graduate programs to address potential identified gaps between formal preparation and practical experience in an ID's work environment. ID graduate programs rarely have a formal mechanism to evaluate their students after graduation. Professors and programs may benefit from

this study's results in order to make informed adjustments to the curricula and methods used to prepare their ID students in an ever-changing practical ID landscape. Essentially, graduate programs do not necessarily need to change as a result of what I find, but the data may be helpful.

This lack of feedback and evaluation protocols at graduate-level programs combined with the growing demand for IDs with advanced ID degrees exacerbates the need for a more complete understanding of ID competencies. Since the 1990s, the field of instructional design has been growing steadily. With estimates of at least 13,000 IDs currently in the workplace, and expected growth by businesses for ID services over the next 10 years (Intentional Futures, 2016; Riter, 2016), the role of IDs is becoming more critical to businesses across a variety of career fields (Riter, 2016). As ID job roles diversify and become more complex, efforts to adapt to these changing circumstances and more appropriately prepare novice IDs for the workplace will not only benefit the ID graduate programs, but will also be of help to the businesses and the organizations they serve (Larson, 2005).

**What Does the Existing Instructional Design Literature Reveal?**

Over the past almost 30 years of development as a discipline, instructional design has evolved and that evolution has been documented by scholars working in academia. The existing academic literature surrounding ID practice has focused primarily on actual practice in business instructional design settings. The next group of ID practice articles relates to the preparation of IDs. There is a lack of attention to the transition made by IDs between these two worlds of ID preparation and ID practice. Aside from the occasional, glancing reference in journal articles calling for future research (Kelly, 2016; Liu et al., 2002; Rowland, 1992; Sugar et al., 2012), the current ID literature is mostly silent regarding the lived experiences of novices during the

transition period between academic preparation and successfully meeting the needs of their employers. Negotiating the disparate performance standards of these two worlds may be disorienting for some novice ID practitioners. Those who hold too rigidly to their formal training may experience longer transition periods than those who prioritize the organizational culture and business goals of their employer in the context of their jobs.

While some recent authors have explored the subject of fit regarding the transition of IDs from school to the workplace (Boot et al. 2007; Kelly, 2016; Thompson-Sellers & Calandra, 2012), these studies have been quantitative. None have looked deeply at the lived experience of IDs' transitions to the workplace using qualitative research methods.

To expand upon similar research in the field, this study explored the practical realities of novice, corporate instructional designers resulting from the melding of their two worlds of learning—ID preparation and ID practice. This was done by interviewing and gathering artifacts from IDs regarding their lived experience in the workplace. I then analyzed the data and attempted to identify patterns based on the practical experiences of the study participants, and draw conclusions to help future designers, the graduate programs that prepare them, and ID employers. The Discussion chapter includes recommendations on how academic programs might prepare prospective IDs to better and more quickly meet the demands of a dynamic business environment. Through studies such as these, ID graduate programs can become aware and better equipped to effectively prepare burgeoning IDs for the practical realities of life in business and industry. The findings of this study may also help other stakeholders as described below in the Stakeholders heading of this chapter.

**Research Question**

In an effort to demystify the practical work realities of IDs as they reconcile their preparatory experience with their on-the-job experience, this study investigates the following research question: Once immersed in everyday practice, how do IDs navigate the transition from completing their formal preparations to workplace life? As a secondary aim, this study articulates specific practical recommendations for study stakeholders regarding the topic of ID transition.

**Definitions**

Key terms and phrases found in the literature are used sporadically throughout this dissertation. For example, the literature references both instructional designers (ID practitioners), and instructional design and technology practitioners (IDT practitioners). For this study, both IDs and IDTs will be referred to as ID practitioners or IDs. Universities can also use either label for their departments. The terms and phrases listed below have the following meanings:

- "Advanced competencies" refers to the competencies or standards that describe the performance of an advanced ID, as established by the International Board of Standards for Training, Performance and Instruction (IBSTPI).

- "Business and industry" refers to the domain of commercial enterprise as distinguished from governmental, health care, K-12, higher education and other domains in which IDs currently work.

- "Employer" refers to the organization or agency that publishes an announcement to hire an individual to do instructional design and technology-related work (it can be a company, a university, a school, or government).

- "Expert ID" refers to one who meets the standards of an expert in the field as dictated by IBSTPI, not just an ID who has advanced experience in the field.

- "Essential competencies" refers to the competencies expected of an ID with 0-10 years of experience in the field.

- "Formally trained ID" refers to a person who has earned a graduate-level degree from an accredited or certified program in instructional design generally offered by a university as a Masters or PhD degree. ID and IDT practitioners trained on the job or by other methods are excluded from this study.

- "ID competencies" refer to an ID's knowledge and abilities according to IBSTPI (jobs; work one is able to perform).

- "ID practitioners" (IDs) refer to instructional designers who are currently working in the ID field and who spend a majority of their time (50% or more) designing instruction.

Some examples of popular job titles found in the literature (Kelly, 2016) and job postings for these two categories of related practitioners include the following:

- ID practitioners
  - "instructional designer" (US term)
  - "instructional system designer"
  - "learning designer" (UK-specific term)
  - "human performance technologist"
  - "performance improvement (PI) practitioner"
  - "chief learning officer"
  - "learning consultant"
  - "strategic consultant"
  - "learning Architect"

- ○ "industrial designer"

- ○ "learning curator"

- ○ "industrial or organizational psychologist" (i.e., those who apply psychological principles in the workplace and manage human resources)

- IDT practitioners

  - ○ "e-learning designer/developer"

  - ○ "technology training consultant"

  - ○ "technology integrator"

  - ○ "e-learning technologist"

  - ○ "learning developer"

  - ○ "e-learning professional"

  - ○ "web designer"

  - ○ "freelance internet consultant"

Note: Purely technical jobs/roles (such as programmer, human resources specialist, webmaster, or information technology specialist) are not included in this study.

- "ID programs" means graduate-level programs in university departments focused on instructional design and training.

- "ID competencies" refer to the measure and standard given to accomplishing an ID-defining task by IBSTPI.

- "Key stakeholder" refers to the project's client or customer, or the person who must approve every major decision that affects the budget.

- "Novice ID" refers to an entry-level ID who is formally trained in the instructional design and technology field with 0-5 years of work experience in the field, as

designated by IBSTPI. IDs mentioned here may have various job titles, but their job requirements match the instructional design and technology competencies that are summarized in the next chapter.

- "Professional organizations" refer to the entities that set standards for professional competency in the ID field.

- "Project manager" refers to the operational manager of a business unit of the employer who is responsible to deliver a training product or result, which may or may not be filled by a senior ID.

- "Prospective IDs" refer to those still in the formal education phase of their careers.

- "Transition period" refers to the indeterminate time period in an ID practitioner's career following formal training and before thriving in his or her job role. This period often entails reconciling differences between what an ID practitioner was taught in graduate school and what is currently being asked of him or her. An ID has fully "transitioned" once he or she is able to effectively contribute to organizational goals. However, do to measurement constraints, I will simply define the "transition period" as the first five years of post-graduate practice in the ID field, regardless of skill level of the ID.

**Study Stakeholders**

The potential impact on the stakeholders of this study may be significant. The findings may provide useful insights to the following six sets of stakeholders:

- Novice IDs: A residual outcome of the study could be to help novice IDs reduce the time and difficulties spent during the natural transition period between graduation day

and successful careers in ID. It may reduce job dissatisfaction for novice IDs. This may lead to improved job performance and higher employment retention.

- ID Graduate Programs: Another purpose is to feed these findings back to ID graduate programs to assist them in making informed adjustments to their respective curricula and other student preparations. This study may reveal ways in which universities can adjust curricula and effectively partner with the business world to help those hiring and using IDs to better meet organizational goals.

- Businesses: While business leaders are unlikely to read this study, hopefully, these research findings will also enable IDs to help the businesses they work for save valuable resources by assisting them to work more effectively with new IDs. The study's findings may impact how businesses choose to hire and deploy their employees. With a better understanding of which skills and tools individual IDs bring with them from their formal training, employers, hiring managers, and line managers may be better able to describe and adjust job roles to make the transition of novice IDs smoother.

- Prospective IDs: This study's findings may inform pre-graduate IDs—those still in the formal education phase of their careers—to leave their school experience with more-realistic expectations of what it means to be an instructional designer in the business and industry world.

- End Users: This study may indirectly result in improved training of the end users of ID services. As IDs emerge from their formal training with more sensitivity to the context of their new work environment, that sensitivity may translate into indirect benefits to the consumers of ID services.

- Professional Organizations: These findings and recommendations may inform future editions of instructional design competencies, like the set of competencies established by IBSTPI.

Additionally, this study's findings may be applicable to other fields, other than that of Instructional Design. There are countless professions that deal with transitioning from academic preparations to work life. For example, the disciplines of nursing, law, and teaching are three areas which may benefit from what is found in this study.

CHAPTER 2

**Literature Review**

**Literature Review Method**

The method followed in this literature review was to conduct a systematic review of the following four collections of sources, looking particularly for published literature dealing with the experience of IDs during their transition period:

1. Research databases: ERIC, Business Source Premier, ProQuest (Education Journals), and EBSCOhost.

2. Articles, dissertations, and book chapters collected by others on the research team.

In both these searches, I "treed" through or "mined" the references to find complementary and seminal literature on the topic.

The literature can be categorized into the following three groupings: (a) *ID preparation* (the formal education experience preparatory to full-time employment as an ID), (b) *ID practice* (on-the-job experience), and (c) *ID comparison* studies (anything spanning the transition period during which an ID navigates the shoals between the worlds of ID preparation and ID practice). The first step in the cataloging of the literature was to read the title and abstract of each article or chapter I found. If the research question of an article related directly to the lived experience of IDs during preparation, transition, or practice, then the findings section of that article was read to discover the degree to which the authors addressed the transition from ID *preparation to* ID *practice*.

When doing the online queries of research databases, Brigham Young University's library research portal, HBLL.BYU.EDU, was used. Primarily the following three journal databases of on that research portal were searched: ERIC, Business Source Premier, and

EBSCOhost. The advanced search function was used to do keyword searches for the following sets or combinations of terms/keywords using Boolean search logic:

- "instructional design"
- "transition"
- "practice"
- "training"
- "education"
- "preparation"
- "learning"
- "graduate school, [program], [degree]"

These combinations of database searches returned hundreds of ID-practice-related articles. The results were then filtered, keeping only those articles and sources that contributed to an understanding of the experiences of IDs in one of the above-referenced three phases of the ID's development—preparation, transition, or practice. After completion of this filtering process against the initial research results, the filtered results were sufficient to capture the scope of the literature landscape from the completion of ID preparation through transition and into successful ID practice.

The ID literature uncovered by using the review process described above revealed that the majority of the articles found examined aspects of ID practice. Another significant portion of the research examined the formal training prospective IDs receive to qualify them to work in the field. The remainder of this literature review focuses on illustrating two major themes: first, that the bulk of the ID practice literature doesn't adequately address the transition experience of IDs. Second, the transition period deserves more attention in the preparation literature as well.

Due to this study's narrow focus of ID transition, I lean heavily on the few studies and authors that most directly address my research question. Despite some of these studies being over 15 years old, researchers are still referencing them today as no more recent studies have been done to replace them. The studies this research rely upon most heavily include Kelly (2016), Larson (2005), Sugar (2014), and Villachica et al. (2010).

**Literature on ID Practice**

The great weight of literature produced on the subject of instructional design over the last 30 years has been practice-focused. Renowned ID practice researcher, Sugar (2014) and his team conducted a comprehensive survey of this practice-focused subset of the literature (Sugar, 2014). Sugar found 102 ID practice-focused articles in his survey and catalogued them into the following three categories. These three categories of practice-focused articles provide a structure for the literature review:

- expert ID practice

- student ID preparation

- differences between expert and novice IDs

The practice literature, which I review first, included a few studies in particular which showed that employers were confused regarding typical ID competencies of novice IDs upon entering the workforce. In support of the overarching theme—that inadequate attention is being given to the transition period for instructional designers—I identified the following seven observations in the ID-practice literature.

First, employers were found to base job descriptions for IDs on academic competencies rather than on business problems (Kelly, 2016). In her dissertation, Kelly (2016) demonstrated that hiring managers used language in their job postings for IDs similar to the language used by

professional organizations to describe the ideal competencies for an ID. Kelly interviewed hiring

managers to find out what ID competencies were most desirable for their organizations' ID roles.

To identify these "must-have" competencies, Kelly collected and analyzed the desired

competencies of IDs from 500 ID job postings listed in the United States, and then interviewed

managers of IDs to validate that these ID competencies really were the skills that were sought in

business (Kelly, 2016). She found that managers expressed a desire that the IDs they hired have

the same skills as those posted in the ID job advertisements. Her findings also highly correlated

with the standards established by the professional organizations focused on ID in the business

and industry domain. Incidentally, the most-frequently listed competency by hiring managers in

her study was "collaborate effectively with stakeholders, subject matter experts (SMEs),

teammates and others."

According to Kelly's study, the ID competencies expressly assessed that received a

mention in more than 60% of the 393 ID job announcements posted on Indeed.com and

SimplyHired.com posted during May of 2015, were

- collaborate effectively with stakeholders, SMEs, teammates and others (75%),

- utilize ADDIE procedure to create learning solutions (67%),

- have knowledge and experience with E-learning authoring software such as

  Captivate, Presenter, Storyline, Lectora, and/or others (64%), and

- apply learning knowledge, principles and/or theories (60%) (Kelly, 2016).

While these statistics are extremely helpful for academics in the ID field, the data has

serious limitations. These competency statements (e.g., "utilize ADDIE procedure") may mean

different things to different people depending on their educational background and practical

experience. It is unclear if those who created these job requirements were formally trained IDs

themselves. But even if the job announcements were created with the help of formally trained IDs, how is one to know if the language was word smithed to meet the business's actual needs or if the announcements were simply copied from previous job announcements?

A second clear observation found in the research is that rapid growth in the industry and constant change in the theory and tools used are the norm for ID practice. The research is clear that in order to make the best use of IDs, and for them to have challenging and engaging careers, organizations need to better understand the role of the instructional designer and the array of skills these designers potentially have to solve business's problems. According to recent studies (Ertmer et al., 2009; Kelly, 2016; Villachica et al., 2010; Wedman & Tessmer, 1993), a mismatch between what employers are expecting of IDs and how IDs perceive themselves may be motivated in part by the rapid growth and constant changes in the world of business and industry as a discipline.

The theoretical and technical landscapes of instructional design change so rapidly that organizations have a difficult time clearly identifying their business needs in the context of ID job roles. The graduate programs that provide the formal training of IDs are constantly struggling to keep their curricula and teaching methods current with the fast pace of change due to technology advancements and the velocity of change in today's business world. EduVentures predicts a 3.7% annual increase in educational technology degree conferral and Cable News Network (CNN) projects that the instructional design discipline will grow by 28-30% over the next ten years (Riter, 2016). Job postings are another metric used to judge the need for IDs. Since 2013, the number of instructional design postings on LinkedIn have tripled (Riter, 2016).

Not only is the market filling with more IDs, but since technology and the growth of the internet make virtually all jobs technology jobs, the demand for and requirements of ID positions

are becoming more extensive and more diverse. Based on ID job postings from 2016, novice IDs were simply required to possess advanced technical skills and knowledge, such as fluency in an e-learning authoring software, and to be able to communicate various instructional design models to stakeholders (Kelly, 2016, pp. 75-76). In comparison, according to recent interviews of ID hiring managers across the United States, it is now common for modern IDs to be tasked with more complex, multi-faceted job responsibilities, which may vary from organization to organization (Kelly, 2016, pp. 84-86).

Due to the ever-changing landscape of educational technologies, IDs preparing to enter the workforce are encouraged to learn to use whatever software programs are currently in fashion. Once in the field however, employers require their IDs to stay up to date and blend the next latest technologies and modalities with the responsibility of facilitating learning. In recent years, these technological advances include virtual reality and predictive learning (Dimeo, 2017; Straumsheim, 2016; Straumsheim, 2017).

As organizations continue to shift to online learning environments, IDs who once specialized in design must now become an expert in both the fields of educational technology and instructional design. As was stated by an ID practitioner, "While a 'jack-of-all-trades' can get by in instructional design, the best instructional designers are 'aces-of-many-trades'" (Intentional Futures, 2016, p. 10). To fulfill the demanding requirements of the modern ID position, organizations are now seeking IDs who are not merely acquainted with, but rather are experts in the following areas: educational theory, research, scholarship, practical teaching skills, educational technology, online education, student learning, and organizational psychology needs (Dimeo, 2017; Straumsheim, 2016; Straumsheim, 2017).

A third observation that emerged in the literature review motivating a deeper look at transitioning IDs is that hiring managers often do not actually know what an ID is trained to do. In his study, Villachica et al. (2010) argued that hiring managers may not know what IDs actually do. Specifically, he suggested that business managers seeking the most qualified ID do not understand or appreciate the full skill set a formally trained ID would bring with them, potentially creating friction due to feelings of lack of appreciation or underutilization of their skills as the ID settles in their job role. Villachica et al. found that most ID managers were unable to narrowly define their expectations and instead wanted their IDs to master almost every possible skillset (Villachica et al., 2010). This is corroborated two years later by a qualitative dissertation by Lechner (2010). In this study, Lechner conducted interviews and found that managers were concerned that novice IDs were ill-prepared for the workplace. Lechner argued this lack of preparation occurred because organizational leaders did not know what to specifically ask for. They hired IDs to solve their organizational problems that they themselves did not fully understand (Lechner, 2010). This observation—that the written job role of an instructional designer used in hiring an ID may not match the needs of the organization—may be a key factor influencing the potentially unsatisfactory experience of novice IDs as they transition from formal training into the workplace.

The literature also suggested that managers think IDs are unprepared because the desired competencies for design roles are diversifying. Wills-Espinosa (2014) found in her Delphi study of competencies for IDs-by-assignment that "[IDs'] roles have changed from designers of instruction to design *alchemists* of flexible and sustainable learning solutions" (Wills-Espinosa, 2014, pp. 29-30).

Similarly, Villachica et al. (2010) concluded that organizations largely find IDs to be unprepared for the workplace. These conclusions lead organizations to believe that they must absorb the time, cost, and resources required to further train these novice IDs in order to enable them to accomplish the company's business objectives. The researchers also posited that organizations might tend to want to hire overqualified IDs, even though the organization may not be able to take advantage of the full skill set of an advanced ID. Villachica et al. (2010) discovered a dissatisfaction among organizations over how novice IDs are prepared, but also found that wasted time, money, and energy for further training can be minimized through use of a specific description of the role of a desired ID in an organization with clear business objectives.

There are some limitations to Villachica et al.'s 2010 research. Aside from limitations related to surveying methods, the authors note the following:

[I]t may be that employers are expecting entry-level IDs to possess more skills than they

need to work at their organizations. In other words, employers may selectively apply

activities comprising the ID model, but they may also want entry-level IDs who are fluent

in all activities comprising the common ADDIE model. (Villachica et al., 2010, p. 47)

Thus, these data are not focused on whether each skill was frequently used or even necessary for the position, but merely on the unrealistic expectation that IDs should have a full and complete array of ID skills, just in case one or more such skill eventually becomes needed.

A fifth theme in the literature concerns job titles, and more specifically, that although job titles may remain the same, their underlying descriptions may differ widely. This supports the idea that there is no standard, stable set of desirable ID skills. This presents a challenge during a novice ID's transition period. Evidence of today's need for this more expanded and diversified ID skill set over the skills required in years past is demonstrated by the reduction in allocation of

budgetary resources for training while on the job. Since the 2008 recession, many companies have drastically cut their overall budgets, especially funds earmarked to provide institutional training (Veletsianos & Moe, 2017). Organizations are searching for new methods of meeting organizational training needs and solving real world business problems that are less costly and more flexible (Sugar, 2014; Veletsianos & Moe, 2017). Expecting an instructional designer with a diversified set of knowledge and skills to solve the training challenges of a business without more support is one of the methods used to solve these financial problems. IDs who are skilled in many areas can fill many roles with only one salary, but only up to a limit.

Instructional design practitioners also face the challenge of not having the same measures for successful job performance as they move from organization to organization. While the general job requirements of IDs have similarities across many companies and industries, ID job roles also vary among employers since their needs and industries within the business domain are different (Kelly, 2016). These task variations make it difficult for graduate-level ID programs to precisely prepare students for the future.

In support of Villachica et al.'s findings, Sugar (2014) provided further insight into the role of the instructional designer in the workplace. His work attempted to capture the current practices of the field of instructional design, including the identification of differences between experienced and novice IDs. Based on multiple research studies, Sugar identified two patterns on this topic. According to the research reported by Sugar, expert IDs thoroughly evaluate a design problem and recommend a variety of solutions once they have a clear understanding of the needs of the organization. Novice IDs, on the other hand, become committed to using just a few surface-level solutions and lack flexibility.

A sixth observation within the literature reveals that it is unclear how the discipline of instructional design fits across organizations. Another study supporting the idea that the employer's understanding of instructional design roles and skills may be flawed or incomplete is found in the domain of higher education. In its 2016 annual study by *The Chronicle of Higher Education,* Rubley (2016) revealed that, with respect to instructional design in higher education, respondents reported that instructional design departments are housed under these areas: 25% are placed under Continuing Education, 38% are placed under Academic Affairs, and 22% are placed under Instructional Technology, with 15% placed under other unnamed departments. The department names vary, including names like *Instructional Design, Centers for Teaching and Learning* and *The Library* or *Instructional Technology*.

Even though this research addressed IDs in higher education, a similar diversity may exist in the domain of business and industrial (Rubley, 2016). Rubley's (2016) report found that 44% of faculty who used IDs felt they could have done similar quality in course design without them. Additionally, 50% of IDs complain that faculty did not accurately understand the role of an ID. IDs tasked with assisting faculty and the university with the creation of educational content and the integration of educational technology did not seem to understand their role in the organization or were unable to explain their role to faculty adequately. In both situations, the disconnect between the two views suggests that organizations may not have a clear and workable concept of the instructional designer. This ill-defined organizational role can cause frustration for higher-education organizations.

The Rubley (2016) study suggested another reason why the transition period of IDs deserves more attention. Often confusion over a novice ID's role may be partially motivated by his or her physical work setting. The fact that instructional design departments are housed in

different places throughout an organization, depending on the institution, is further evidence of the murkiness regarding instructional design job roles in business organizations. An ID is going to need precise and accurate training to meet the needs of their future employer. They need to know an organization's context and goals to be most effective in their work. There is currently no consensus on the role, hierarchy, and accompanying responsibilities of ID departments in entities. Even the size of the ID team widely varies from 1-10 IDs (41% of respondents) to over 20 IDs (26% of respondents). Since every organization is structured differently, IDs are naturally located in different places, inevitably leading to them to take on the job roles/processes that are specific to the portion of the organization to which they are adjacent or assigned. Although all of the respondents to this 2016 survey were employed in Higher Education, it is reasonable to assume that potential variation of ID locations/roles would exist in other domains of ID employment as well.

A seventh and final ID-practice-related observation that serves to illustrate that the transition period deserves more attention in the literature is that significant on-the-job skills improvement is critical for formally-trained IDs. Thompson-Sellers (2012) recently illustrated this point. Using a mixed-method analysis, the researcher used the IBSTPI competencies to survey and interview IDs in business and industry in order to better understand the needs facing selected organizations in the industry. Most survey respondents agreed that in addition to formal instructional design education, on-the-job training is essential for IDs to learn the tacit knowledge and skills necessary in an organization. Thompson-Sellers also showed that both ID managers and ID non-managers reported that formal training is critical when combined with on-the-job training (although non-managers reported that formally trained IDs lacked flexibility,

understanding, and creativity). The researcher recommended further inquiry into how instructional design students transition to the workplace.

In addition to the literature suggesting that misunderstandings as to roles and skills exist between novice IDs and their employers about the scope and elements of ID job requirements, some organizations also feel it necessary to "re-train" new hires. When Villachica et al. (2010) surveyed ID managers on the activities desired in their organizations, the respondents reported the following data.

When asked to rate important *analysis* skills, managers reported the following were important:

- writing performance objectives (97%)

- selecting or modifying instructional content (96%)

- conducting a task analysis (90%)

- selecting appropriate media (90%)

- identifying appropriate instructional strategy based on analysis (87%)

- conducting a front-end analysis or needs assessment (87%)

- conducting a learner analysis (83%)

When asked to rate essential *design* skills, managers reported the following were important:

- sequencing objectives (94%)

- creating a design document (85%)

- creating assessment instrument (77%)

- creating an evaluation plan (75%)

- creating an implementation plan (69%)

When asked to rate important *development* skills, managers reported the following were important:

- developing instructional materials in the appropriate medium (91%)

- promoting collaboration among stakeholders (53%)

When asked to rate important *implementation* skills, managers reported the following were important:

- monitoring the implementation (68%)

- conducting client reviews (66%)

- creating rapid prototypes (64%)

- conducting a usability test of the prototypes (63%)

- providing logistics support (55%)

When asked to rate important *evaluation* skills, managers reported the following were important:

- conducting a pilot test of the development materials (86%)

- conducting summative evaluation (68%) (Villachica et al., 2010).

In the same paper, Villachica et al. (2010) reported that, according to the managers interviewed, only one-third of novice IDs can adequately perform basic instructional design skills such as conducting a needs analysis, identifying an appropriate instructional strategy based on analysis, and creating an evaluation plan. The data show that, despite these skills being critical to the ADDIE process,

- 71% of IDs are unable to create an evaluation plan,

- 64% of IDs are unable to perform a needs analysis, and

- 55% of IDs are unable to identify appropriate instructional strategies based on their analysis.

Even skills for which many IDs can meet expectations, there are a large number of IDs who struggle to meet expectations in performing basic ID skills. For example, 38% of IDs are unable to meet manager expectations when writing performance objectives—which is considered by most in the ID field to be a basic skill.

**Literature on ID Preparation (Formal Training)**

The second-largest bulk of literature germane to the practical lives of instructional design is that focused on ID preparation. This preparation is primarily provided by academic ID programs, which teach and train students to engender ID competencies promulgated by professional organizations such as The International Board of Standards for Training, Performance and Instruction (Koszalka et al., 2013). Many IDs are trained in the discipline of instructional design by enrolling in an ID-related graduate program in higher education. Many large universities offer a certificate, master's degree, or doctoral degree in instructional or educational design. Not only do these graduate programs serve as the epicenter of study in the field, but they also produce research and create theories that inform practice. In this sense, these programs play an important role in preparing IDs for their future work in the field.

The remainder of this section of the literature review will observe seven areas where the ID-preparation literature insufficiently addresses the period of transition for IDs. The framework for the first five observations come from Larson's 2005 and Larson and Lockee's 2008 and 2009 surveys of ID job roles in changing workplace environments, Sugar's 2014 meta-analysis of ID practice literature, and Villachica et al.'s 2010 survey of ID hiring managers. These studies were

referenced more than others because they offer the strongest evidence for the phenomenon addressed in this study, covering both breadth and depth.

Firstly, IDs typically have already had wide array of work experiences before entering the field. It is common for IDs to begin graduate school already having a breadth of experiences in areas such as web design, library science, publishing, computer programming, and many other skills (Intentional Futures, 2016). Novice IDs bring this knowledge with them upon entering graduate-level ID programs. While some universities place a focus on teaching the scope and breadth of available technology tools for use in ID projects, many of the students now come to the programs already having e-skills and a background in technology, such as video and computer programming (Wojtecki, 2012). In the many studies I reviewed, I only came across one that discussed how pre-graduate-school skills and experiences may have contributed to the professional practice of IDs (Larson & Lockee, 2008).

Secondly, graduate-schools may be able to better prepared novice IDs to navigate the school-to-workplace transition. ID programs focus on training novice IDs to understand the theories, methodologies, and tools of the field and how to apply them in the workplace (Wojteck, 2012). However, this training may be only a part of the skills required for an ID to contribute meaningfully in the workplace. Most programs teach IDs to apply common theories, methodologies, and models such as Systematic Model of Design or ADDIE in the workplace. Additionally, graduate programs seek "real-world" opportunities for their students to apply these ID skills in the workplace through internships and experiences working with ID practitioners. These opportunities are designed to allow students to practice project management skills and improve communication and implementation skills. However, this literature never seems to discuss the conflicts that arise due to the application of these teachings during these "real-world"

learning experiences. Due to their training nature, the experiences themselves are sanitized—protected from the messiness of full-time, committed engagement with an organization.

In his 2014 book, Sugar reported that the skills and knowledge that novice IDs consider necessary are only part of the skills important for them to be successful in the workforce. This implies that there are skills required of IDs by the workforce that are not being adequately addressed during their formal training.

A third observation that emerged regarding ID preparation was that there were a wide array of ID positions available upon graduation and many different methods by which IDs are prepared for the workplace. These findings support the need for more practical and effective ID preparation. Larson (2005) conducted a landmark analysis regarding the effectiveness of instructional design preparation in higher education. Larson then clarified it with a follow-up analysis in 2009 (Larson & Lockee, 2009). In the 2005 analysis, Larson conducted an online and mailed survey to gather data on how IDs are prepared for different career environments, whether specialized training or general training is more successful in preparing IDs, and how well IDs feel they have been prepared for the workplace. The survey resulted in 148 responses from the combined online and mailed survey groups. The researchers found that 70% of IDs in the sample had at least a master's degree in instructional design, and that over 60% of designers worked in the fields of higher education and business (and industry). The survey also found that approximately 65% of respondents were trained in a general program (an education program that provides instructional design skills and knowledge commonly found in all domains using instructional design) while approximately 35% of respondents were trained in a specific program (an education program the covers instructional design skills and knowledge that are specific to a single sector or domain of ID consumers). The breadth of different methods of ID preparation

used by graduate programs demonstrates the lack of uniformity in the set of skills taught in ID programs to those seeking to work in the business and industry arena. It also points out the significant and inherent difficulty of preparing IDs for every possible employment situation. These difficulties are pointed out by the fourth observation exposed by surveys conducted by Larson in his (2005) report. A search of the literature did not find a more contemporary piece of literature.

Fourth, Larson (2005) found that IDs are well-prepared to perform theoretical and textbook instructional design work but are ill-prepared for working in a real-world environment. According to Larson, 59% of novice IDs feel unprepared for workplace politics, with another 40-46% reporting issues with managing workload; finding resources; balancing quality, timeliness, and cost; and challenging or criticizing managers—all common workplace skills.

When Larson asked how well their program prepared them for the workplace, 25% of those IDs trained in a general program felt ill-prepared for workplace culture and to perform the common workplace skills referenced in the prior paragraph, as well as dealing with scarcity of resources, differing management styles, and managing the amount of decision-making freedom afforded to the ID, These results suggest that graduate programs either do not understand or are ineffective at preparing IDs for a significant portion of their role in the workplace. Larson stated that "the results of this study should serve to encourage [instructional design] program administrators to survey their own graduates for valuable data on program strengths and weaknesses" (2005, p. 32).

In the literature regarding ID preparation, the fifth observation suggests that graduate programs prepare their graduates for a variety of ID roles across multiple career domains. Larson reported that 35% of the respondents stated that their program focused on a single field of

instructional design such as business or higher education. It is worth emphasizing that only 9% of ID graduate programs specifically focus on preparing their graduates for success in the domain of business and industry. The researcher also found the following statistics:

- 11% of specific programs focus on higher education

- 10% focus on K-12 education

- 80% focus on government and military

- 70% did not record the field of their program (Larson, 2005)

While the differences between how specific programs prepare prospective IDs for their fields were not reported, Larson (2005) found that many of the IDs surveyed—either from a specific or generalist program—felt that they were offered flexibility in their course offerings. Over 60% of those surveyed responded that they were able to personalize 11-49% of their program hours to take courses that more directly align with their educational and future employment goals. An additional 9-22% reported that they were able to personalize over 50% of their program hours. Larson argued that this flexibility allows their graduates to appeal to a broader number of potential employers. This flexibility would be especially helpful if the inexperienced IDs knew what would be expected of them upon entering the workplace.

The data provided by Larson demonstrated a frustration among some graduates that more practical training is needed during graduate school. Further research is needed to better align ID preparation with the realities of the field because the specific, practical competencies needed for a novice ID to be successful are still unclarified in the literature. As more competencies are identified regarding the transition from graduate school to the workplace, graduate schools would be better able to tailor their programs to prepare their students to be more successful in their first jobs in ID.

In 2009, Larson and Lockee elaborated on how IDs are prepared for the workplace by academic programs (2009), and the results of the 2005 Larson survey by conducting several interviews. The researchers focused on two questions:

1. What are the approaches used by faculty of exemplary ID programs to prepare IDs for different career environments and the cultural aspects of those environments?

2. How does an exemplary ID program inculcate the preparation approaches of its faculty? (Larson & Lockee, 2009, p. 7).

Larson and Lockee (2009) conducted interviews with 17 faculty members, five alumni, two students, and an 11-participant student focus group inside a single instructional design graduate program. The results are interpreted to indicate that employers in business and industry are more concerned that their IDs know context-specific skills—such as gap and cost analysis—while these skills are not as valued by instructional design leaders in higher education. Larson and Lockee (2009) cited that faculty also reported that it is important for novice IDs to know and have some skills in the following six identified cultural aspects of the workplace:

- the nature of internal workplace politics

- trade-offs between quality, timeliness, and cost in work assignments

- availability of project resources for work assignments

- the amount of freedom given to make decisions

- employer attitudes toward change, innovation, and risk

- workload balancing

Faculty also noted that organizational values could be different between public and private sectors requiring a focus on different aspects of instructional design (Larson & Lockee, 2009). For example, larger public business organizations may encourage use of a more thorough

design process like ADDIE, while the often smaller private business organizations may prefer a more rapid design model such as SAM.

These two Larson studies (Larson, 2005; Larson & Lockee, 2009) provided insights into how graduate programs view their responsibility to train IDs who intended to work in business and industry. While the faculty at the specific program that was studied reported success in teaching workplace cultural issues, the faculty self-perceptions of teaching success appeared to contradict how managers perceived novice IDs' ability to navigate workplace cultural issues in the field (Villachica et al., 2010). Further exploratory research into the transition experience of IDs is needed to determine precisely where the novice IDs themselves struggle as they enter the workforce.

The sixth preparation-related observation found in the literature is that IDs need context-specific skills in school for success in business and industry. A study by York and Ertmer (2016) examined which ID principles ought to be taught in graduate programs to prepare IDs for the workforce. The approach of the York and Ertmer study used the Delphi process to determine how IDs who work for organizations are taught during their graduate school preparations and how this transfers to the workplace. Through the Delphi process, the researchers identified 61 instructional design principles and determined that not all the principles fit well into commonly taught instructional design models. The researchers used these 61 principles to conduct their analysis.

York and Ertmer (2016) found that 29 of the 61 principles reportedly used by IDs in the workplace did not directly align with any instructional design model. This is in contrast to the large amount of focus and attention that instructional design models reportedly receive in higher education graduate programs. The researchers recommended that instead of merely memorizing

instructional design models, novice IDs learn the practices and principles used by experienced IDs to solve organizational problems. The researchers also reported that current studies suggest that there is a difference in how experienced IDs and novice IDs use these principles, but both groups of IDs base their practice on the principles in ID programs. The researchers recognized the importance and practical application of the principles taught in ID programs; however, they stated that the competencies taught during the graduate school experience could be implemented more effectively to better prepare novice IDs for the workplace.

Despite the data gained from the research, the York and Ertmer (2016) study has limitations. Namely, the results are constrained to the groups surveyed and cannot represent the principles across the entire field. Additionally, the researchers recommend a more thorough examination of the principles and how they are taught to, and used by, novice IDs.

The final observation in the literature is that the preparation of formally trained IDs is guided to a large degree by the definitions and guidelines established by the professional organizations supporting ID practitioners and the ID programs. For IDs in business and industry, there are three principal professional organizations according to the existing literature: (a) IBSTPI; (b) The International Society for Performance Improvement (ISPI); (c) The Association for Talent Development (ATD). Most of the ID competencies promulgated by these three professional organizations mesh relatively well, but for simplicity's sake, this study will use the ID competencies promulgated by the most popularly cited association: IBSTPI.

When IDs emerge from ID programs, it is assumed that they bring with them ID competencies established and administered by professional organizations. Many of these competencies are informed by the IBSTPI. The ID competencies established by this Board have become the framework by which graduate programs, researchers, and even business

organizations, measure and study instructional design. IBSTPI's ID competencies provide a foundation on which to build the field of instructional design broadly, but those ID competencies are generalized and thus do not provide specific ID competencies tailored to individual businesses or industry organizations. As the role of the instructional designer becomes increasingly complex, a greater understanding of how to customize ID competencies to tailor them to specific businesses and industries will be needed within the broader context of the ID discipline (Riter, 2016).

The IBSTPI ID competencies were created in 1986 by a group of ID professionals and academics after more than a year of research regarding the field of instructional design. These competencies are organized into several categories: professional foundations, planning and analysis, design and development, evaluation and implementation, and management (Koszalka et al., 2013). As the field has changed in practice and through advances in technology, the ID competencies have undergone formal revisions in the years 2000 and 2012 (Koszalka et al., 2013). The current competencies are the result of decades of research and collaboration among ID experts, academics and members of professional organizations in the ID field and are widely used.

The IBSTPI ID competencies are frequently the conceptual or theoretical framework for research studies (Brown, 2016; Chen, 2012; Lechner, 2010; Leigh & Tracey, 2010). Those ID competencies are used when measuring instructional designer quality (Figueroa, 2014; Fyle et al., 2012; Moskal, 2012; Richey et al., 2001; Thompson-Sellers, 2012; Wojtecki, 2012), and when discussing the history of the field, and changes over time (Hilbert, 2015; Ritzhaupt & Kumar, 2015; Tracey & Boling, 2014). The ID competencies are also used in determining the roles of IDs by not only academic institutions, but also by employers who turn to them for

guidance on what skills to expect when employing an ID (Larson, 2005; Larson & Lockee, 2009; Villachica et al., 2010).

**Literature on the ID Transition Period**

The third and final category of Sugar's (2014) monograph is the one most closely associated with the focus of this research. Of the 102 articles he reviewed and reported on, he categorized only 10 as articles dealing with the differences between expert and novice IDs. The two common research questions in those 10 studies on the differences between *ID experts and ID novices* were researched:

1. What are the differences between an expert ID and a novice ID?

2. How do novice IDs gain ID expertise?

Of those 10 studies, 6 were quantitative in nature. Since the research question for this study is qualitative, my review of this category examined more closely only the 4 of those 10 studies that used a qualitative approach. Those studies asked the following questions:

1. How do students perceive the ID process? Hardré et al. (2006)

2. How do ID students gain expertise from peer interaction and from a cognitive apprenticeship model? Ge and Hardré (2010)

3. How do students' perceptions and background and ID course materials influence their ID expertise development? Hardré and Kollmann (2013)

4. How do experts and novices solve ID problems? Fortney and Yamagata-Lynch (2013)

In addition to these journal articles, two dissertations dealing with the ID transition period from education to practice have recently been produced. Each sheds unique light on an aspect of the ID transition period.

In his dissertation at Boise State, Villachica et al. (2010) asked, "What skills do potential employers expect entry-level instructional designers to possess? And to what extent have their recently hired entry-level IDs met these expectations?" He found that most novice IDs could not perform to the entry-level expectations in spite of assistance. This finding is evidence of a misalignment between ID program requirements for graduation of novice IDs and ID entry-level practice expectations of those same IDs.

Olsen's (2018) dissertation used a quantitative approach to test hypotheses regarding novice ID transitions. His survey of novice IDs was designed to identify a potential misalignment between the formal preparations of novice IDs and the perceptions they held of the work required of them. Olson found that the perceived managers' expectations of IDs, the designers' expectations of what they are asked to do, and graduate schools' expectations of how best to prepare IDs to contribute to the workforce all differ from one another. He also suggested that novice IDs overestimate their abilities and standing in their field as they graduate from an ID program. Olsen suggested that this is because the differences in competency between novice and advanced IDs are difficult for non-IDs to evaluate. Since pay differential is very significant between novice and advanced IDs, there is an incentive for novice IDs to believe and try to persuade their employer that they have more skills than they may actually have. This financial incentive to embellish one's competencies adds a layer of complexity to the process of transitioning to become an expert ID.

A few additional articles offer specific contributions to the practical realities of ID transition while calling for more instructional design scholarship to support the need of helping students transition from academics to practice. But none of these findings are exclusively

dedicated to exploring the transition period for a novice ID (Kelly, 2016; Lui et al., 1992; Stefaniak et al., 2018; Sugar et al., 2011; Villachica et al., 2010; Wedman & Tessmer, 1993).

**Comparison of Literature on Practice, Preparation and Transition of IDs**

Some of the ID literature has touched on the topic of the transition period for IDs, and even developed specific hypotheses regarding transition-specific challenges. Several researchers have studied both the practice and preparation of IDs (Ge & Hadré 2010; Hadré & Kollmann, 2013; Rowland, 1992; Uduma & Morrison, 2007). But fewer have studied the time period that marks the transition between the worlds of preparation and practice. Researchers who do broach the subject of the transition period have either done so from a moment in time or frame their research questions so that they are best addressed quantitative. Few researchers are exploring this period of the lives of IDs from a qualitative perspective.

Although instructional design graduate programs are designed to prepare IDs for the workforce, the literature suggests that they could benefit from a better understanding of the practical lived experience of novice ID in the workplace. Findings throughout the literature indicated many graduate schools, employers, and even students held different expectations of what competencies a novice ID ought to bring to the workplace. These differing expectations may arise from a poor understanding of the diverse and ever-changing roles of IDs in the workplace, which makes it difficult for graduate schools to align their academic programs to specific workplace competencies.

In summary, my review of the literature suggests that there is very little known about this transition period. In the pursuit of better understanding, we ought to know more about critical period in the lives of IDs. Qualitative inquiry can help us do this. One way this could be

addressed is by conducting further research on the lived experience of novice IDs during their

transition period in the workplace. This study is designed to respond to this lack in the literature.

CHAPTER 3

**Method**

**Research Design: Applying an Interpretative Phenomenological Analysis Framework**

This study used an Interpretative Phenomenological Analysis (IPA) framework as advanced by Smith et al. (2009). I employed IPA's two to three interview approach. Following typical IPA assumptions, I acknowledged the inevitability of biases, preoccupations, and assumptions when conducting qualitative research. These a priori views reflect on how I shaped my research inquiries and, just as Gadamer (1989) did, I aimed to engage with them fruitfully for the purpose of understanding. This involved taking a questioning and dialectical stance to these fore-understandings and the material I sought to understand, recognizing it as an always-unfinished activity. This was because, very often throughout the interviewing and analysis process, I was simply unaware of what my assumptions where when I begin pursuing the research question. Rather, I become aware of them as I questioned and clarified my emergent interpretations. For a detailed exposition of the theory and philosophy which informs IPA, readers are referred to Smith et al. (2009).

One of the areas in which I diverged from Smith's traditional practice of IPA is in the addition of bracketing. Smith & Osborn (2003) find it virtually impossible to feel truly honest and "bracket" at the same time due to the inevitability of researcher bias. I adopted a definition of bracketing from the hermeneutic tradition. This involved being aware of as many key assumptions as possible and being cautious that they didn't warp the meaning researchers emerging from the phenomenon. I strove to allow participants to speak for themselves throughout the inquiry process and be open to what I could learn from their personal accounts and views of ID practice. During the data analysis process, I did my best to examine each

transcript and draw out its unique meaning; not looking at associations and connections among participants until after each round of interviews had been conducted. Ultimately, the findings of this study were a kind of collaboration between participants and me—what might be thought of hermeneutically as a *fusion of horizons* (Fleming et al., 2003; Gadamer, 1989).

It is important to note that hermeneutics is not a set of rules to follow, but rather "a creative approach to understanding, using whatever approaches are responsive to particular questions and subject matter" (Laverty, 2003, p. 28). However, hermeneutic inquiry also cautions against most interview methods of data collection. From a hermeneutic perspective, the ideal object of study is "what people actually do when they are engaged in the everyday practical tasks of life rather than in the detached contemplation that characterizes pencil-and-paper tasks and most interview situations" (Packer, 1985, p. 1086). For that reason, I strove to triangulate data types where possible, particularly through gathering work-related artifacts to support participant interviews.

**Participant Selection**

Participants were selected through purposeful criterion sampling (Patton, 1990). To include a more interesting set of participants, I intentionally selected participants with diverse backgrounds (who meet the sampling criteria). Perhaps the most important factor to consider was the participant's workplace size. I selected at least one participant from a small (startup) company, a larger company, and a company of dedicated instructional designers. Once the companies had been purposefully selected, I strove to create as representative a sample as possible among the respective participants.

In qualitative research, sample sizes are relatively small compared to quantitative inquiry. The purpose is not to make general or sweeping statements about a population. Rather, it is to

examine meaning in a particular sample. Then, readers are free to transfer meaning to their own contexts. The greater the trustworthiness of the study, the more confidence readers can place in comparing their circumstances to this study. For Interpretative Phenomenological Analysis—the data collection and analysis method I have used in this study—it is common to examine a single case study or participant, and in some instances, even a single interview.

The initial request for participation was made through the supervisor or other point of contact at IDs' companies. ID managers were asked to allow an ID from their organization to participate, or to recommend another company who may be willing to assist in this study. The diversity of the participant sample was enhanced by selecting IDs with diverse formal training backgrounds and varied levels of work experience, within certain bounds. Participants were invited to participate without monetary compensation. The search ultimately yielded five participants with the following varied backgrounds and experience levels in instructional design:

- at least a Master's degree in ID, or equivalent experience

- graduated from diverse training institutions (while graduate ID program emphases will be noted, participant selection will not be based on that factor as long as the program arguably prepares the learner for an ID job in business and industry)

- stratified gender mix (proportional to ID field—about 50/50)

- limited to those working in the domain of business and industry

- current type of work must be an ID related position (e.g., they have to be involved with approximately 50% design work)

- years of experience (e.g., they have had at least one ID job and are between the first 1-10 years of work in the field

To further narrow the specifications of those included in this study, I tried to select participants who had enough time in the corporate world to be able to offer multiple examples, while keeping them close enough to their time at school to remember what beliefs and expectations they had for the field. Additionally, I expanded the definition of "instructional designer" to include more participants than just IDs with a graduate degree in instructional design. Merrill (2007) estimated that up to 95% of all instructional design products may be created by individuals with no formal instructional design training. Merrill referred to this type of designer as the *designer-by-assignment*. Prepared in other disciplines, these designers tend to be subject matter experts called up through the ranks into positions of leadership and assigned to teach others what they know. Not having formal background with learning theories, models, and principles, designers-by-assignment offer a substantial and unique perspective to the phenomenon of ID transition into the world of practice. In recent years, a few doctoral students have conducted further research on how designers-by-assignment make practical design decisions (Pesce, 2012; Pic, 2016; Wills-Espinosa, 2014). But none of these studies looked specifically at IDs transition into the field. Fortunately, this study includes a designer-by-assignment as one of its participants.

**Data Collection**

Participants were asked to engage in a three-stage interview process. Additionally, at the end of each interview, participants were asked to provide artifacts from their everyday work experience.

Following the IPA framework established by Smith et al. (2009), I conducted a series of three, hour-long, semi-structured interviews with participants regarding their transition experience situated in everyday work experience, and what practical implications those

experiences had in their daily lives. These questions were based on an interview protocol proposed by Smith and Osborn (2003). (See Appendix A for example interview questions.) As I performed the interviews, I was sensitive to the participants' diverse backgrounds and open to their different educational backgrounds and degrees of practical experience.

The purpose of the first round of interviews was to develop a relationship with each participant and discuss the phenomenon of transition generally. While guided by a protocol, I avoided strict adherence to it. Rather, I allowed the conversation to develop naturally. At the end of first interview, I asked the participant to email me any artifacts that might be help readers better understanding their transition experiences.

In the second round of interviews, I addressed the details of the participants' practical lives-on-the-job with a focus on their transition period as an ID in the workplace. The focus of this round of interviews was be less on exploration, and more on clarification. The stories, beliefs, and themes revealed in the first round of interviews were reviewed and followed up on in the second. This allowed for a deeper dive into, and negative case analysis of, emerging themes.

The third and final interview was used to clarify and follow up on themes that participants had not yet been given an opportunity to respond. I also discussed possible still-emergent themes as well as allowing participants to bring up any new information they felt was important and applicable to the focus on the study. This third and final round of interviews was essential in yielding some of the richest stories and insights into participants' experiences of all the prior rounds of interviews.

A combination of technologies was used to capture the interviews, including Zoom video conferencing, an iPhone voice recording app, and contemporaneous note taking.

To the extent possible, artifacts of the IDs' work and training experiences were collected. Suggested artifacts included hiring documents, interview protocols, written job descriptions, journal reflections, products, flowcharts, low-tech drawings, process maps, job announcements, meeting minutes, design docs, performance reviews. These artifacts were intended to allow the research team to gain insight into and meaning of participants' work practices, as well as triangulate the data for greater trustworthiness.

**Data Analysis**

Interpretative Phenomenological Analysis (IPA) was used to analyze the interview transcripts. This widely-used method was particularly useful in understanding participants' perceptions of their personal and social realities. This method is often used in qualitative research when an exploration of meaning and experience is sought, as opposed to hypothesis testing. Figure 1, below, is a visual aid to help the reader better understand the flow of the IPA process:

**Figure 1**

*IPA Flow Chart*

## 1. Study a Single Transcript

The researcher reads the transcript, multiple times, becoming familiar with the content.

## 2. Make "Left-hand" Comments

In the left-hand margin of the transcription, the researcher notes interesting or significant reactions to the data. (E.g., summarizing, paraphrasing, and associations/connections that come to mind. There are no rules about what is commented upon.)

## 3. Make "Right-hand" Comments

In the right-hand column, the researcher develops themes out of the left-hand comments, which are more psychological, concise phrases.

## 4. Identify Emergent Themes in a Table

The researcher begins to order a list of emergent themes across a single interview in a table. The columns might include: quotation, citation within the transcript, theme, and code.

## 5. Order, Drop, & Cluster Themes in the Table

After studying the initial list of themes, the researcher reorders and combines themes into superordinate or "meta" themes—dropping others—to provide greater meaning for the reader. (If there are more cases, the researcher then moves on from the transcript, repeating stages 1-5 for additional interviews/participants.)

## 6. Continue Analysis of Additional Cases

One can either use the themes from the first case to help orient the subsequent analysis or put the table of themes for participant 1 aside and work on the next transcript/participant from scratch. Whichever approach is adopted, one needs to be disciplined to discern repeating patterns, but also acknowledge new issues emerging as one works through the transcripts. Thus, one is aiming to respect convergences and divergences in the data.

IPA has a six-step analysis process. In the first step of IPA, each transcript is read and reviewed until the researcher develops a close familiarity with the participant, the context, and some of the general ideas expressed by the participant in the interviews. Next, as a second step of IPA, the text of the participant interviews is read and annotated with descriptive, linguistic, and conceptual comments (Smith et al., 2009). These comments are intended to note things of interest or any reactions the researcher had to the data. This includes summaries, paraphrasing, associations, and connections that come to mind. Each comment is viewed on its own before attempting any cross-comment analysis. This activity places importance on key phrases and the participant's specific word choice to then be extracted and analyzed and preliminary interpretative notes to be created later on. During the third step of IPA, each comment is analyzed, reviewing the original text as needed, and formed into a concise, meaningful statement, or code, that represents each comment. For example, when a participant expressed job-role frustrations, I would highlight the relevant text, and comment "R: RF" to indicated that it was a "right-margin" comment with the code representing role frustration (RF). Other metadata was included in the comment box too, including: the participant identifier, the transcript citation, and a paraphrasing of the quotation to tie it to the theme. Once all of the comments are carefully analyzed and codes developed, using the fourth step of IPA, the relationships between these newly created codes will be evaluated, re-ordered, and clustered into superordinate, or higher-order themes. The processes of *abstraction* (related themes cluster together and are given a new name) and *subsumption* (an emergent theme that takes on superordinate status and subsumes other related themes) are employed to organize the themes (Smith et al., 2009). In IPA's fifth analysis step, each superordinate theme is checked against the transcript to assure it has been properly included in the data. In the event that the researcher is

working with multiple cases, IPA's final step is to iteratively apply steps one through five to each subsequent interview transcript of each additional case. Smith et al., (2009) give the researcher discretion to look at each with fresh eyes, or to bear in mind the themes already discovered up to that point. In this study, I attempted to look at each of the transcripts with an open mind. Only after all of the interviews had been analyzed for each round did I go back and look at them holistically for similarities and differences, allowing me to perform negative case analyses in the subsequent rounds of interviews.

These guidelines were strictly followed during this study. First, data was collected. Themes naturally emerged among participants during first-round interviews. These themes were noted and analyzed within the interview transcripts themselves. These data were then compiled within a separate, master-table document and reworked to identify common themes among participants. These common themes were then reintroduced to participants in subsequent rounds of interviews. After repeating this process for the second and third rounds of interviews, themes from this master table were then combined, reorganized, or eliminated to create subordinate and superordinate themes. Ultimately, the first seven themes became principles of a new framework to help understand the transition experience of business IDs from their preparation to practice. A final theme offers this study's stakeholders participant-generated recommendations related to this phenomenon of ID transition.

The work of collecting and analyzing the participants' artifacts happened simultaneously with the interview process. The same rigorous IPA steps used to analyze the interviews were used to analyze the participants' artifacts. While a greater amount of time was spent collecting and analyzing interview data, the artifacts were equally important in capturing the overall picture.

**Trustworthiness Standards**

For this study, I followed the qualitative inquiry standards developed by Lincoln and Guba (1985). This framework was chosen because it is most commonly cited in qualitative studies published in the journals to which this dissertation is intended to be submitted for publication: Performance Improvement Quarterly (PIQ), Journal of Research on Technology in Education, and Harvard Business Review. I adhered to the four main criteria of trustworthiness for a study: credibility, confirmability, dependability, and transferability. I also observed the additional criteria of meaningfulness and ethical treatment of participants in the study.

*Clarifying Researcher Bias*

Clarifying researcher bias entails revealing the background, perspectives, and theoretical orientation of the interviewer, both at the beginning and throughout the study. These were addressed with each participant in their first-round interviews.

*Member Checking*

Having analyzed the previous round of interviews, I clarified my initial findings from each participant in their respective subsequent interviews to ensure that I had accurately captured their experiences. After the study findings were finalized, I asked the study participants to review the final report to confirm, expand upon, and collaboratively discover any new meaning from the data of their collective experience.

*Peer Debriefing*

My research team was primarily composed of my dissertation chair, and a fellow qualitative research and recent doctoral graduate from my department. I shared with them a reflexive journal containing descriptive and self-reflective comments regarding decisions I made throughout this study. The journal served as an audit trail, which my research team regularly

reviewed throughout the data collection, transcription, and analysis processes. They offered

regular feedback, which typically lead me to see beyond my innate research biases resulted in

interview protocol refinement for subsequent interviews. Additionally, I consulted with members

my dissertation committee as needed to address questions related to their expertise.

*Triangulation*

      Triangulation is important in order to verify the findings discovered through multiple

sources. Triangulation of data for this study included the gathering of data from multiple

interviews and the review of related artifacts.

*Prolonged Engagement and Persistent Observation*

      I conducted a greater number of interviews than suggested by IPA, providing a deeper

look into the phenomenon of ID transition (*persistent observation*). This study also employed

*prolonged engagement* (provides scope) by spreading out the interviews over a year. Three of the

five participants had moved to new jobs over this time.

*Negative Case Analysis*

      Negative case analysis increases credibility. It involves intentionally identifying instances

that do not fit themes that emerge in data analysis. This began during the initial literature review.

However, once I collect data from participants, I returned to the literature and searched for

studies which disprove emergent themes and patterns. Additionally, I conducted an informal

intra-study negative-case analysis for among each of the five participants as I drew out themes

from each of the participants. For example, when two or three participants remarked on one

potential theme in their round-one interviews, I would then present that initial finding to the

other two for their comment in the next round of interviews.

*Confirmability and Dependability*

Confirmability and dependability were addressed through the detailed record keeping of how the final conclusions were reached in this study. For this study, I carefully reviewed each interview transcript at least five times in order to confirm that the themes and other findings were justified by the data. This process included listening to audio recordings of the interviews and checking them against the written transcripts and field notes. I looked for contradictory information and performed member checks.

Another level of credibility to the study's findings was added by keeping an audit trail journal. Since research is an unfolding experience and not an event, I updated my audit trail journal weekly, tracking my thoughts on the research and decisions I made from its inception to its submission. These were kept in a shared electronic folder and were made available for peer debriefing, and regularly reviewed with my dissertation chair.

Additionally, the literature review added one more level of confirmability to the study by either supporting or deviating from this study's findings. Doing this exposed similarities and contrasts in experience, allowing for discussion and further insight into the phenomenon.

*Transferability*

Transferability means that certain findings may be applied or be insightful in other contexts, to be determined by the reader. Since this study has a sample size of five, all its findings can only speak to the shared experience of its participants. However, in order for this study to be more easily transferable for the reader, I featured specific quotations from the data in the findings section, along with my interpretations of them in context in the discussion section.

*Thick, Rich Description*

Thick, rich description allows the reader to interpret the data through clear reporting of details of both context and time. The more context that is provided, the more substantive description of participants' experiences will be available to help the reader know if what was written could be applied (i.e., transferred) to them. Through these rich descriptions (Stake, 2010) of the study, readers are then better positioned to evaluate the usefulness of the study for their particular situation.

*Ethical Treatment*

I used the Institutional Review Board's (IRB) standards to guide the ethical treatment of participants throughout this study. (See Appendix B for the IRB letter of approval.) Each participant signed informed consent forms before beginning to data collection. Pre-written email communication with participants was reviewed by the IRB as well. To protect the identities of both instructional designers and companies from any potential negative publicity, the names of participants were either be omitted or disguised.

CHAPTER 4

**Findings**

**Participant Profiles**

The five participant summaries are brief descriptions of each participant's story and background as it relates to their experience of transitioning as an instructional designer before and after full-time employment in the corporate world. The amount of content shared in these vignettes strikes a balance between offering readers a rich look into participants' personal lives and maintaining participant anonymity. Their summaries will be presented in the following order: Kate, Pepper, Valentino, Tyler, Fred.

Incidentally, three of the five participants (Kate, Pepper, and Valentino) selected their own pseudonyms for this study. This choice was given to the participants as a way for them to express themselves, and also to allow the reader to get an even richer look at their personalities. Kate based her name on a woman in her own family history. Pepper named herself after her cat, Dr. Pepper. (We decided to truncate that to Pepper in order to avoid any confusion with her level of education.) Valentino said, "how about you call me Val; it's short for Valentino. That's what I wanted to name my son." Tyler and Fred gave no preference.

Table 1, below, highlights some of the study participants' basic biographical information. Hopefully, this will help the reader appreciate similarities and differences among the participants at a glance.

**Table 1**

*Participant Biographical Summary*

| Pseudonym | Gender | Years in Field* | Bachelor's | Master's | Current Role |
|---|---|---|---|---|---|
| Kate | Female | 7 years | English (2006) | ID (2012) | Online Training Manager |
| Pepper | Female | 3 years | Film making (2012) | ID (2016) | Learning Experience Designer |
| Valentino | Male | 9 years | Secondary Education (2006) | ID (2010) | Learning Architect/ Consultant |
| Tyler | Male | 7 years | Anthropology (2007) | ID (2015) | Instructional Designer |
| Fred | Male | 7 years | Digital Media (2012) | NA | Learning Systems Manager |

*Years in Field refers to the time between completing a master's degree (or entering the ID field) and their first study interview (2019).

### Kate

Kate is a single, Caucasian female in her mid-thirties and a teacher at heart. She is bright, charismatic, and speaks quickly. She graduated with a bachelor's degree in English and completed a master's degree in instructional design in 2012. One thing that stood out to me about Kate is her special ability to care deeply for her learners in order to design interventions that will best meet their instructional needs. Recently, Kate has been focused on helping her company shift focus away from a behaviorist teaching philosophy and more toward an experiential, learner-centric one.

When asked what first interested Kate in the ID field, she mentioned that she cared about two things—loving helping others learn, and effective communication. To offer the reader a richer flavor her personality, I'll share her own words:

KATE: I'm so into the people that I'm instructing. I'm always excited about them. I always care about their experience. I care about their feelings. I care about, like, whether

or not they've found value in what we're doing . . .. I always feel energized by teaching .

. .. I also have an ability to articulate myself . . .. At [the university] I was in [a writing

assistance] program and that really helped me work on things like concision, [and] being

clear . . .. I care about effective communication and articulating things in a way that

everyone can understand; that has come more naturally for me.

When asked what she does for work, Kate described her current job role as follows:

KATE: Currently I'm a [curriculum] manager for online teaching . . .. I've actually been

deployed to a team in [a branch of the parent company] whose focus is developing the

training and curriculum we give to [our sales team] who serve [customers] online.

## *Pepper*

Pepper is a Caucasian female around 30 who enjoys the liberal arts. She is married and

graduated with a bachelor's in Media Arts. She graduated in the field of instructional design in

the last five years while working part-time in business. Pepper has the least number of years of

experience of all five participants in this study. Her first full-time instructional design position

after graduating with a master's degree was with a fast-moving, startup company. But now,

Pepper works at a slower-moving government research facility. This shift in dichotomous

workplace environments led to some unique insights, which will be expounded upon later in the

Results section.

In the quotation below, Pepper explains her discovery of the field and her ability to

relatively quickly identify what she did not enjoy about the field:

PEPPER: I wanted to design Visitor Centers. I wanted to design learning experiences that

were not formal . . .. After I got into the [graduate school] program I was working as an

instructional designer at [Company X] and they said, "Hey, do you want to go to an e-

learning conference?" . . .. "Yeah!" And I went to that, and I came home and I was like, "I am never going to do that stuff." I hated it so, so much.

Once Pepper decided to shift careers into the instructional design field, she felt insecure about her ability to get into a graduate program and shared some strategies that showcased her initiative and problem solving to maximize her likelihood of getting accepted:

> PEPPER: I started [my graduate school program] in August 2014, and I graduated in December 2016. And I was initially very, very worried that I wasn't going to get in to the program . . .. So I put tons and tons of time, energy, and money into getting a good score on the GRE, and then I took [an instructional design authoring tools] class. I also went and talked to as many professors as I possibly could.

### Valentino

Valentino is a Caucasian male in his late-thirties who began his career as a K-12 school teacher and "worked his way up" to oversee all of design at a large company. He is married with four children and graduated with a bachelor's degree in secondary education. He went on to earn a master's degree in instructional design. Since graduating, Valentino has worked for five different companies of varying sizes. His story captures more of the inner transition of what he finds rewarding in the field of instructional design, and searching for positions to meet those desires. One of the great frustrations Valentino has experienced in his time as a corporate instructional designer is that his managers do not allow him to use his full skill set as an instructional designer.

In the following quote, Valentino revealed how he was introduced to the field of instructional design. This story also illustrates Valentino's love of teaching and education, and his inherent instructional design skills. It also highlights his desire to make a difference in

people's lives on a larger scale (as well as a desire for a career that makes more money). His commitment to family is what motivated him to power through his ID graduate program.

> VALENTINO: So I was teaching . . . a few graphic design classes . . . and after class one evening, one of my students . . . came up to me and he said, "Hey . . . you could be an instructional designer. You'd be really good at it, I can tell . . . I would love for you to leave teaching and come work for me." And he said, "I wouldn't even require any additional education or anything," He offered me $80,000 a year at the time, which was double what I was making as a teacher. Anyway, that was very appealing, except for that he wanted me to move to a little town of 200 . . .. It piqued my interest. [I told him] "I would love to maybe do a little bit of education in instructional design." I said, "I'm not really familiar with the field." Anyway, he thought I was a total fool for even looking at education . . .. But I went ahead and pursued the education anyway, and, like I said, took a couple classes to see if it was something I even liked . . .. At the time, I took what [instructional design classes] I could, just to sample it. I decided I loved it, turned in my notice, and quit teaching that year . . .. I went and did my degree . . . all in one year . . . that was my deal with my wife if I was going to quit having a paying job.

## *Tyler*

Tyler is a married Caucasian male in his early forties. He has an inquisitive and cautious disposition but has plenty of energy for the things he is passionate about. One of Tyler's passions is anthropology, a field in which he earned a bachelor's degree. Tyler also earned a master's degree in the field of ID. Upon transitioning from graduate school into the workforce, Tyler pursued a design opportunity with a government contractor on the West Coast. He has been able to leverage his anthropology background as he works with subject matter experts, with whom he

explores new cultures and knowledge areas. Tyler refined his ethnographic field methods, including interviewing and participant observation, while living abroad. His story below also reveals his introduction to the ID field and focuses on his transition experience as he worked with and managed human capital in different capacities.

> TYLER: I was working at [a university] in their study abroad office . . . when the financial crisis had happened and that was putting a lot of pressure on our programs to be financially viable . . .. We had some pretty good programs in place, but I thought, "You know what we really need to take this stuff to the next level is someone who understands instruction," so that's kind of how I started looking into the field, and then it turned out that we had a great program right at [the university] . . . so it just was just a natural thing to kind of jump into that.

Upon graduating with a master's degree, Tyler soon found work with two companies, one full-time and the other on call. He is currently working with both. Tyler felt validated in his design skills that the young government contracting company would reach out to him and offer him a full-time position.

> TYLER: It was 2013 when I started with [a government contractor], located [on the West Coast], and I was there embedded with some departments basically until the end of that year, and then I started working with [an instructional design firm] . . .. [The government contractor] wanted to offer me a full-time salaried position, which is a big deal because they were only a few years old and that was the first time they'd ever done that . . .. [The instructional design firm] thought it would be good to keep me on their call list in case they had a lot of work come through and needed some help.

*Fred*

Fred is a Caucasian male in his forties with disparate interests across the field of design and development. Fred has an affable personality and pursues multiple interests, most of which revolve around professional skills development, like virtual reality (VR) and augmented reality (AR). Fred earned a bachelor's degree in digital media, which led him from a career in web development more towards e-learning. Fred describes his transition into the discovery of the field of instructional design and his place in it as follows:

FRED: I started out in college as a psychology major . . . but I eventually realized . . . that I liked video development . . .. Eventually I started learning a lot more about web development and in web development . . . so I got into web production . . . [and] started at an e-learning development software [company] . . .. I knew nothing about e-learning at that point. I was just learning web-development . . .. I eventually started moving over to creating . . . learning interactions and creating those games and different types of activities for the tool itself. And then . . . I would do a full-day training on how to use the software itself . . .. [at] conferences . . .. [Then] I went over to [a small, family-based company] . . . and I doubled their template library while I was there . . .. I started creating a lot of webinars and training, and . . . along the way I started learning about what a subject matter expert is, different learning theories like ADDIE . . .. Then an opportunity came up at [a large corporation] . . . [where] we had seven people that were just focused on e-learning development. I was running a whole, you know, instructional design development, from instructional design to development to publishing to the LMS shop . . . . so this is where I'm doing more instructional design probably than I have in my entire

career, because I'm creating those trainings and I'm worrying about programs and structures and quizzes and other things like that.

INTERVIEWER: Good! Okay. Most of my participants have graduated from an instructional design program, however, there is room for participants who are instructional designers by, I can't remember what Dave Merrill calls it, by necessity or something. They're kind of hired up through the ranks. Does that sound like your path?

FRED: Yeah. As for . . . my other positions, I never really did instructional design. I was more, I was given the storyboards and then I develop the storyboards, but I have created, you know, my own curriculum . . .. Here I'm doing a lot more instructional design kind of storyboarding and writing, in my current job. So, I think it still applies. I think the term that I've heard is like "Accidental Instructional Designer" but I have done a lot more development than I have instructional design.

**Interview Findings**

Many themes emerged from the analysis of the 15 interviews conducted with the study's five participants; only some of the themes are included in these findings. This section will elaborate on eight themes relevant to this study's research question. The first seven themes became principles of a conceptual framework illustrating the ID transition experience from preparation to practice. I refer to this framework as the "ID Practitioner Transformation Framework." This framework serves as a structural narrative for the collective transition experience of the participants. Since study participants experienced these themes in different orders chronologically, and often many times throughout their initial years of employment, the seven themes ought to be viewed as principles rather than steps. The eighth and final theme is a

list of recommendations participants offered throughout the data collection process. This theme is not a principle included in the framework.

All themes have been supported using quotations from participants. Some quotations have been edited for clarity. This chapter seeks to introduce and explain the themes without offering interpretation. Further interpretation regarding each theme is provided in the following chapter.

**ID Practitioner Transformation Framework**

Upon completing their formal preparations, each of these five participants have worked in the corporate domain as instructional designers for less than decade. As they entered the business world they were met with institutional confusion. Their new employers did not have a full understanding of the skills instructional designers could provide for their companies. What added to the confusion was the fact that the study participants entered their ID roles with their own their potential contribution to the workforce. They were surprised and often frustrated to discover that their expectations did not align with their employers' expectations of what their respective instructional design roles ought to be.

Faced with confusion and frustration at work spawned in part by their unmet expectations, the participants asserted their own role expectations in their work environments in three ways—each requiring an increasing level of permission from their employer. First, they took action in small ways requiring no permission. Second, they moved to actions that required buy-in from co-workers and immediate supervisors. Finally, they worked to achieve an extensive overhaul of their job role. I list numerous examples of how participants followed this pattern of increasing assertiveness. When asserting themselves, participants employed separate techniques

for negotiating expectations with two groups of stakeholders: (a) business leaders, higher in the organization, and (b) the participants' peers.

The ways in which the participants learned to personally evaluate their success and satisfaction often were discovered over time, after transitional growing pains. Participants came to recognize that they had both responsibility and power to shape their own future job roles. Having gained experience in the corporate arena, all of the participants were able to identify ways in which they would tweak their job role to find a greater amount of personal satisfaction. In conclusion, the participants offered a number of recommendations to future corporate IDs, the graduate programs who produce them, and the businesses that hire them to help smooth the transition of ID practitioners from their success in ID education to success in the business world.

The remainder of this section includes Table 2, which lists the seven- principle framework. Table 2 is then followed by a detailed explanation of its individual principles. Each of these principles is derived from a common theme based on participant data. After the framework is discussed, a final theme regarding participant recommendations for study stakeholders is included.

**Table 2**

*ID Practitioner Transformation Framework*

| Framework Principles (Themes) |
| --- |
| 1. Role Confusion |
| 2. Role Expectation |
| 3. Role Frustration |
| 4. Role Assertion |
| 5. Role Transformation Strategy |
| 6. Role Validation |
| 7. Responsibility for Future Role |

**Principle 1: Role Confusion**

The five participants in this study unanimously agreed that there is a general state of confusion surrounding the role of instructional designers in the corporate world. Confusion over an ID's job role was due to no accepted definition of that role in business, in education, and amongst IDs themselves.

*Confusion in the Business World*

In this study, business employers were generally ignorant of what instructional designers were qualified to do. Pepper remembered her internship employer exclusively assigning her clerical tasks. Pepper said, "my employer had me do weird things like reformat his PowerPoint presentations and read through his stuff and make sure that the grammar was right."

If they are not an instructional designer themselves, hiring managers often do not know (and sometimes do not care) what the job role of an instructional designer should be for their own company. When hiring for instructional design positions, Tyler said that some businesses

are just been happy to have anyone assigned to think about training: "I just think we're dealing so much with people that are so strapped and overcommitted . . . that just even having a willing body in a chair is enough." Valentino shared, "Stanley calls all of his people Instructional designers; not a single one of them are . . . so it's kind of up to me . . . to help the company realize that what Stanley has is *not* designers; what I am is a designer."

Those driving the business typically do not know *how* instructional designers contribute to the realization of their vision. According to Fred, C-level executives are not concerned with the process instructional designers follow. They are primarily concerned with the company-wide metrics that drive business growth. If there is a problem, they would shift people around, but not seek to improve the process itself. When asked who in the company did not understand what his team did, Fred commented that, "it was just more of upper management that didn't really understand what we did. They were happy with what we did, but they didn't understand it."

Tyler was initially hired as a scriptwriting and instructional design intern. For a year, he worked on a project and was only ever viewed by his co-workers as a writer until the sticky note experience:

> TYLER: [Once] I ran over to Staples during my lunch break and I came back with these Post-its. And I'm like, "okay, section one, first video." [Boom!] and I slammed it on the board. "Second video." [Boom!] "We also need to cover this topic." And it was blowing the [boss's] mind. He was like, "oh, *that's* what you do. You figure out how stuff connects and sort of the structure of the ideas; you're not just a writer."

Companies who do have some understanding of what the role of an ID ought to be still often confuse it with a developer role. Valentino repeatedly has this discussion with his various managers:

VALENTINO: Most companies look at an instructional designer and go, "Oh, you make training. That's what you do." And it's like, "No, that is – It's one of the things I do, yes, but is it the core thing I do, and is that the answer to every problem? Absolutely not, and if all you have me doing is making trainings, you're using, like, ten percent of my skill set . . .. I told my boss, "Making training is a small part of what I learned to do in my degree; I can actually solve problems for this company and I can do it in a way that is lasting."

When asked about his entire experience in the ID field, Fred said that most companies are primarily interested in someone who can convert content from one media to another.

FRED: A lot of the times, when people are hiring instructional designers they just want them to convert their content, when in all honesty that could just be an e-learning developer. I think that those two roles probably need to be split and so some of the job postings that they're posting for instructional designers really mean that they want an e-learning developer to create that content.

Pepper shared a metaphor illustrating the job role differences between a corporate instructional designer and developer.

PEPPER: Well, it's like the difference between a software engineer and a product developer or product designer; you don't ask them to do the same thing, and in fact software engineers often make terrible product designers.

INTERVIEWER: That's a good metaphor.

PEPPER: That distinction is very clear, but it's not as clear for instructional design.

After leaving, Fred looked back and realized that his former employer did not understand the difference between instructional designer and developer roles. "[My former employer] didn't

have any concept of Instructional Design over there. The term 'instructional designer' never came up."

After months of resisting the developer stereotype of his design position, Valentino told a manager in defeat when he was eventually brought in on a project, "Hey, just tell me what you want me to make and I'll make it."

In rare circumstances, manager and ID definitions and expectations regarding ID job roles will be in alignment, which can come as a shock. Valentino shared a story where he was conditioned to have managers tell him what to design. He was pleasantly surprised when some creative control was turned over to him during a practical work conversation with a manager.

> VALENTINO: Right after I got this job, my very first project that I got assigned from my boss, I asked him, I said, "So, how do you want that done? What kind of process do you want me to follow?" And his eyes went huge and he looked really concerned and he goes, "I totally thought you knew how to this. That's why I hired you." And I said, "I do. I do. I know how to do this. You want me to do it how I want to do it?" and he goes, "Yes! Yes! Please just do it. Just get me the outcome I'm looking for." And I was like, "Done. I'm in. I'll totally do that . . .. This is like a dream come true."

Another factor that contributes to the confusion surrounding role of instructional designers in business is that, despite the existence of academic standards like those published by AECT and IBSTPI, there is no generally-*accepted* industry standard for what an ID does. This leaves organizations to fend for the themselves in developing job roles and positions for their instructional designers. In practice, organizations hire instructional design graduates to fill whatever organizational needs are pressing. For example, in Figure 2, Kate held six instructional

design-related titles within her company since she began work on her master's degree 10 years ago.

**Figure 2**

*Kate's Job History Diagram*
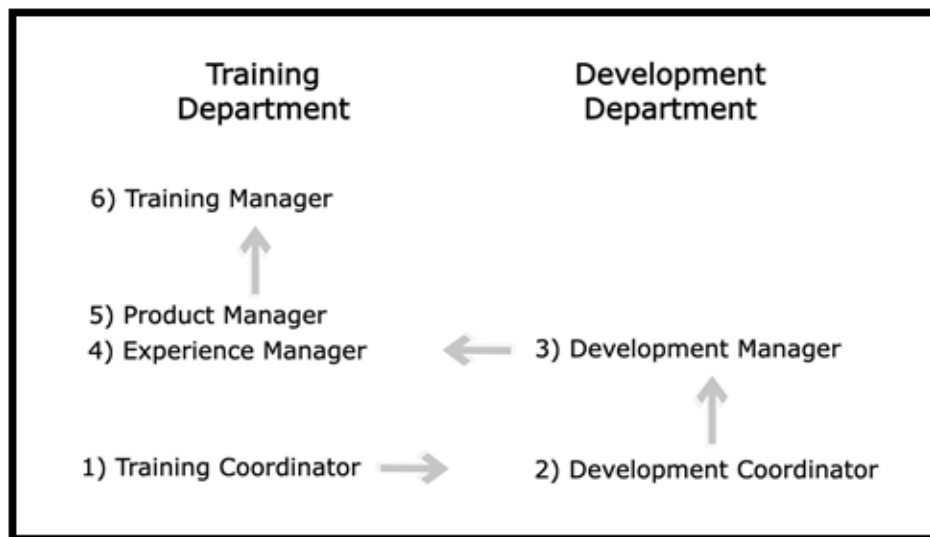


Confusion over the role of an ID practitioner in the business world can be traced to the employers' ignorance of the discipline and breadth of the capabilities of ID practitioners, employees being labeled as "instructional designers" when they cannot do the tasks expected of that role, and the changing needs of business in a rapidly changing business environment.

***Confusion in Higher Education***

Another source of ID role confusion is that graduate programs are typically designed to prepare graduates for diverse careers in multiple industries. Most ID-related higher education departments have multiple emphases, which cater to the unique interests of their students. As a result, it is unlikely that an ID graduate's skills will perfectly match any given job description. Kate voiced this idea regarding her graduate school experience, "A degree's trying to prepare

you for this broad, unknown future . . . it's kind of broad enough to cover a little bit of everything."

Valentino speculated that due to every graduate program having a different emphasis in the ID field, it makes having a unified definition of an ID's role impractical.

VALENTINO: It would be great if we were able to get companies all on the same page of, "Here's what an instructional designer can offer." The trouble is I don't know how you would come to that consensus because what I learned at [my university], my understanding is that is way different than what somebody at [another university] learns. These graduate programs tend to offer a broad preparation for design thinkers rather than a trade school for a specific job role.

That approach, combined with the different emphases of each ID program, makes having a unified and well understood sense of what an ID practitioner can offer by the business world unrealistic. Job role confusion is the result.

### *Confusion Among Instructional Designers*

Although instructional designers are clear about their own skills and qualifications, they are often not clear about what their roles are within organizations.

Valentino claimed that regardless of what is in the online job description or what is communicated in the interview, an ID still has no clue what their job role will be.

VALENTINO: When you get a job as an instructional designer, who knows what you're going to be doing for that company . . .. You become an instructional designer for a company, you have no freaking clue what that means. That could be anything. That could be anywhere from somebody's PowerPoint flunky that just puts their presentations together, to actually doing some legit design and performance work for the company.

Fred recalled how many Instructional designers at one of the companies he worked for years ago were not clear at all about what they were supposed to do for their employer. "I think . . . a lot of organizations don't understand who does what. Even here at [my current employer] . . . I don't think upper management has that all laid out . . . so I think that's a frustration for a lot of people."

Kate admitted of the ID label, "We have a horrible brand, like, no one knows what we do. No one can describe it. Every time I tell someone about my master's degree, I'm like, 'Yeah, Instructional [Design], that means how to help people learn stuff.'"

For the five individuals in this study, their transition from their school days to their time in the business world has been filled with confusion for over a decade. Some of the participants had difficulty communicating more than a general definition of their perceived job role. Among participants themselves, confusion over job roles in specific work settings arose when neither they, their co-workers, nor their managers had a unified understanding of what the ID label meant within their organization. All of these factors contribute to the general lack of ID understanding of how the study participants could best contribute to the business world.

**Principle 2: Role Expectation**

The study participants each had slightly different expectations about what an instructional designer ought to bring to their job role. Pepper expressed her expectation that good instructional designers should be able to make complex information accessible.

PEPPER: I believe when I'm acting as an instructional designer, my job is to take the nebulous, convoluted ball of knowledge, which is difficult to wrap your head around, and morph it, massage it, structure it in such a way that it becomes approachable, and accessible, and understandable for a novice.

Fred observed that instructional designers are more like learning architects; they want a birds-eye-view of projects, but they rarely get it.

> FRED: I see instructional designers more as architects and not really the person doing the building, necessarily, but they're the ones that are overseeing the outcomes . . .. [Hiring managers] don't necessarily want someone to look at [projects] holistically—I know almost all of the instructional designers that I worked with . . . wanted to be the ones to have the birds-eye-view of everything and how all the products from end-to-end worked together to help, you know, with the learning objectives and things like that, but I think a lot of job postings people just want somebody to get in and work with Storyline, or work with Captivate and stuff like that, which, honestly, just an e-learning developer would actually be able to handle that kind of stuff.

Tyler had his own expectation for what he thought instructional designers should do. It included three things:

- articulating performance objectives (or behavioral outcomes)
- strategically aligning learning outcomes with appropriate technologies by using Bloom's taxonomy
- representing both etic (instructional designer or learner) and emic (expert) perspectives

> TYLER: What the instructional designers offer is being able to articulate objectives and being able to align those objectives with an instructional strategy . . .. In anthropology, you talk about the emic and etic perspective and the insider and the outsider and that's what an anthropologist brings to understanding a new culture.

Same thing with instructional designer . . .. A good instructional designer is able to

take both those perspectives and be able to think as a learner.

All of the participants mentioned at some point in their interviews that they mistakenly assumed instructional designers had more control related to project design decisions, or expressed a desire for having a voice earlier in the design process. Valentino stated that instructional designers should have a say about *what* to teach before project managers are even brought on. "I had the illusion that an instructional designer . . . should be in a position in the process . . . that comes before the project manager is even told there's a project to work on. They should be at the point of which solutions are being devised to problems."

Valentino was taught in school that an instructional designer's goal should be learner performance over engagement. Valentino expected industry instructional designers to be able to design training solutions that meet learning objectives. That wasn't the reality when he got out into industry. He was frustrated to discover that industry thought creating an engaging activity was essentially all that was required to produce an effective outcome. "They [e-learning development company] are 100% focused on the entertainment aspect and keeping people engaged in the learning, if you can call it that, but, yeah, my interest is in 'Let's get people to actually perform the action we're wanting them to perform.'"

As a result of member checking in the second round of interviews, Kate clarified that she believed that IDs with classroom teaching experience might be more sensitive to the need to help learners change rather than just deliver a project on time, on schedule, and on budget. Valentino agreed with the emerging finding that instructional designers with teaching background tend to desire greater control than they have over the design of the corporate learning experience.

VALENTINO: Because I spent years standing in front of students teaching . . .. I've seen it firsthand how people react to different methods of learning . . . so I think the reason you find that annoyance of "Don't control what I'm doing" from those that have been teachers is because they can – or at least feel like they can – more accurately predict the outcomes. When it's being dictated to them by someone who doesn't know those outcomes or isn't familiar with the education background, it's really frustrating when you're going, "From my experience as a teacher, this is not going to have the effect you think it's going to have."

Fred argued that instructional designers are responsible for training effectiveness. If projects flop, their jobs are in jeopardy.

FRED: [Instructional designers] have to be the ones to prove that [their learning solution] is effective, just like here I have to be the one to prove that what I'm doing is actually working and getting results because if I don't, then management is like, "Well, why do we need you, then? What value are you bringing to the company?"

In contrast to the other participants, Pepper did not seem to experience any personal confusion regarding her purpose as an instructional designer, thanks to a broad definition of ID given to her by one of her first business managers: An instructional designer's role is simply to "look at the problem, solve the problem." Due to the vague nature of this definition, she was able to encompass most others' definitions within it, thus avoiding most clashes in terms of role expectation.

PEPPER: I know that there is a huge debate about what is Instructional Design, and it's hard to define things; and I don't know that I really identified a ton with that conundrum. I think a big part of the reason why is because while I was in school, I was also working

for [another corporation] part-time as an Instructional Designer, and the manager that

[said], "Look at the problem, solve the problem, whatever, I don't care." He wasn't so

restricted by boundaries, and because of that, I think I kind of absorbed that mentality.

Pepper did eventually run into role expectation trouble, however. For Pepper, instructional

designers should not be required to have development skills. Despite having lost job

opportunities because interviewers held the opposite assumption, Pepper decidedly does not ever

want to develop e-learning.

> PEPPER: Near the end of the [job] interview, the guy was like, "I see that you don't have
>
> any experience with e-learning development. I really like you as a person and I think
>
> you're a great candidate, but what about this e-learning development thing?" I think that I
>
> have lost job opportunities because of that lack of e-learning development. People expect
>
> instructional designers to have that . . .. I just hate it, and I don't want to do it, ever.

Upon entering the business ID field, participants assumed their employers understood, and were

prepared to take advantage of, the participants' ID skill set. However, all of them reported

experiencing either a lack of understanding of their ID capabilities from their respective

employers, or that their business personnel or processes were structured in such a way as to limit

the study participants' ideal contributions. Each of the participants noted early on in their

interviews that they were able to clearly identify ways in which they could help their companies

could improve their operations.

Interestingly, all four participants with ID-specific, formal training expected to have been

given greater authority over the design process. Fred, who had an instructional *development*

background, had fewer expectations of his employers regarding his given job roles. Rather, he

seemed to prioritize helping strengthen the company's bottom line over asserting correct design principles along the way.

**Principle 3: Role Frustration**

After gaining some experience in their ID positions, each of the study participants soon discovered that their ID role expectations differed from their respective employers' expectations, which naturally led to frustration on both sides of their role—theirs and their employers.

*Job Role Conflict*

Upon earning a graduate degree, Valentino was excited to help "move the needle" for his employer. He envisioned himself as an integral part of the company's training and development decision-making process. However, he was discouraged to discover that he was viewed as a dispensable resource.

> VALENTINO: [Valentino's former company] very much treated you as if you were a part of a short-term gig, even though you were a full-time employee and so forth. There was always this feeling of, "When you finish this project, we may have another project for you or we may not and we may just fire you." And that was interesting, too, that you were, as an instructional designer, that company you were very much a resource to them.

Valentino was frustrated with the corporate industry's minimized expectations for an instructional designer. According to Valentino, over the past 10-20 years, the perception of the average instructional designer has been reduced to its least qualified member. In Valentino's example below, the standard instructional designer hired by companies today is like a "pilot who only knows how to taxi down a runway."

> VALENTINO: A pilot is somebody who can fly a plane . . . .. If you called [someone] a pilot, but suddenly the majority of the industry was saturated by people who really could

only taxi the plane out of the gate, but beyond that they really didn't know how to fly the plane, your definition of pilot would change of what a pilot does. And so because we've saturated the industry with these people who . . . all they know how to do is to produce a product – they have no idea if it'll work; they aren't interested in people's improvement . . . because that's become the dominant saturation of the market in instructional design, that has also become the definition of what an instructional designer does.

Due to the seasonal nature of her company's work, some of Pepper's co-workers didn't have job responsibilities during the off season. In an effort to keep everyone busy full time, Pepper's manager had her pass along some of her work load to them. Naturally, they performed those ID tasks poorly. Essentially, due to incompetence and poor management, Pepper's job role became even more blurred and conflict arose within her team.

> INTERVIEWER: Talking about [your former employer], how did your job role differ from your teammates' roles? Was there any confusion about that? What motivated you to reinvent your role the second half of your time there?
>
> PEPPER: So [my manager] . . . would just keep saying, "Well, pass stuff on to guy number two." And I was like, "He doesn't know how to write. He sends it back to me and it's two pages long when it could be a half page, and it doesn't make any sense, and it's really difficult to read." And he's like, "Well, why don't you teach him how?" I was like, "Dude, I don't have time to teach someone how to do the job that they were supposedly hired for."

These conflicts and resulting frustration arose due to a manager's ignorance of the depth of the skills of the ID they hire (the "pilot" example) or application mismatched skills to the ID job

required in the name of productivity (the "share tasks with others" example). Role frustration

was the natural and should have been the expected outcome of these situations.

### *Instructional Designer Allegiance Tension*

One of the recurring sources of frustration for all five participants was the tension they

felt between serving their bosses and serving the end user. Their allegiance was torn. Each of the

instructional designers in this study reported a time when they felt they had to decide between

providing "good training" and accepting others' design constraints, which typically resulted in

poorly-received products. Study participants pushed back against project constraints under two

circumstances: either when they went against their academic training, or when participants felt

the constraints did not serve the best interests of the end user.

Kate was frustrated by departmental and managerial constraints that kept her from

implementing best design practices.

> KATE: It's frustrating when the [organization] is not willing to . . . change the plan . . ..
>
> We worked on a project a while ago where they just said, "You can only have two
>
> pamphlets," and everything in my instructional design part was like, "That is not the right
>
> solution for this problem," but we're not going to go back to someone and say, "We have
>
> to have three pamphlets for this." You know? So, we got stuck doing not the best solution
>
> just because of some of the constraints we were given.

Kate felt an essential skill for instructional designers to learn was the ability to say no to

passionate stakeholders. This is done when the instructional designer can see the learners first

and focus on objectives.

> KATE: I actually think there's a really interesting emotional component to this – that
>
> there's a level of emotional skills around it that are really helpful, like the ability to say

'no', to not please all the stakeholders equally or based on whomever pushes you hardest

. . .. I've grown a lot in my career to have the courage to say, "Hey, I really don't think X

decision is going to accomplish the result that you want, even though X is your idea, and

you really care about it passionately."

Of all the study participants, Valentino was the most ardent in his allegiance to his own

principles over others' ideas. Valentino perceived himself as the organizational expert and rarely

backed down when it came to an internal-project battle over design decisions. Valentino said, "I

don't know if I would say I had to change my way of thinking, but I definitely had to fight for

my way of thinking."

When Valentino confronted a former manager about the misalignment between his

perceived job role and what he was actually asked to do, he was shocked to discover that the

manager did not care that Valentino felt he was underperforming given his salary.

VALENTINO: I think, industry in general feels like an instructional designer is very

good at the *execution* of instructional design concepts. They don't realize that we're also

very educated in the dreaming up and the designing of these solutions. So [I'm] sitting

there speaking the same language in this hiring interview, not realizing that, in the

background, the employer's already made all these decisions for me . . .. At least a dozen

times, [I] went to my boss and said . . ."You could hire someone for half what you're

paying me and get the same results because I'm not designing anything for you. I'm just

developing. You could hire—you could freaking hire someone without an instructional

design degree, someone with no education background because you're being so

prescriptive in what you're telling me to do. You don't need anyone with any education,

you need a developer!" I'm like, "You need somebody who can learn software and just

crank this crap out for you." They kept going, "No! You're valuable! We want you here!" and I'm like mind-blown. I'm like, "You guys are [dumb]. You are so overpaying for what you're getting." And that's true for a lot of companies. They go, "We want an instructional designer. We want somebody who really is good at this," which sounds great to us [in a job interview], but what they're really saying is, "We want somebody who can execute on these ideas we're having" . . .. In school, we were taught to execute on our own ideas. But in business we're really executing on someone else's ideas.

Recalling the story about Stanley's team of "non-instructional designers," Valentino said the biggest factor that defines an instructional designer goes back to their motivation—learner growth versus checking an arbitrary box.

> VALENTINO: The biggest difference between me and Mary [on Stanley's team] is that I want whatever I produce to make people better employees because of what they're learning, and she's producing what she's producing because she wants to get it done and off her plate and back in the clients' hands, and have them give her five stars on her rating that she did a good job. That's her interest.

Like Valentino, Pepper also felt like she was underutilized by her first employer. She felt like her employer had a different understanding of what an ID does compared to what she felt she had to offer. Here is the story of her experience at her first job:

> PEPPER: When I was hired at that weird start-up that was in that guy's basement, he wanted me to rearrange his PowerPoints so that the text was in a different order. I did ask him, "Hey, all of the innovative people that you show pictures of are all white dudes that had mid-life crises. Can we change that to be other people so that other people can be innovative too?" He was like, "Yeah!" So that was the kind of stuff I did; I changed

pictures to be more inclusive . . .. I tried to say . . . I could do a lot more, [but] . . .

because he taught a little class at [a university], he was like, "Next semester I'll let you

just take over that and do the whole thing." . . .. I was like, "Okay, I'm getting out of here

as soon as possible."

For a time, participants generally accepted the ID job roles defined for them by their employers.

Although these daily work responsibilities may not have been perfectly aligned with their skill

sets and perceived ideal work environments, the participants demonstrated flexibility and

patience in an effort to best meet the needs of their employers. However, a mismatch between

role expectations of the participant and the manager, failure of the participant's team to apply

good design principles, or conflicts in stakeholder allegiance, role frustration crept in and

motivated participants to initiate role change.

**Principle 4: Role Assertion**

When the study participants experienced job dissatisfaction during their transition into

the field, they did one of three things. They either did nothing, changed themselves, or changed

their environments.

*No Change*

After finishing working for a large company for almost two years, Pepper realized that

she never completed a single project. In other parts of our interview, she noted that this was

primarily due to the fact that deciding project scope was outside of her given job role at that

company. Pepper admitted, "In the year and half, year and three quarters that I worked there, I

finished nothing . . .. Like, a couple prototypes, sure, but they were half-baked and mostly just

these weird ideas . . .. That was really, really frustrating."

Pepper was assigned to work under a project manager with poor management skills. She observed that this was likely due to [department] inbreeding, but her job was not to get projects out the door, so she did nothing to assert herself in that way.

> PEPPER: One of the reasons why [that company] is such a difficult place to work . . . and does not make a lot of progress on their products and their projects is because they always hire in the family; they never hire people from outside that have experience outside of [that company], so it just is this constant regeneration of more people who have the same bad habits of not knowing exactly how to manage products and projects . . . .. I think that was a systemic issue that was not my job to solve that problem. I was lubricating the axles so that they could at least move somewhere.

By accepting the corporate stereotype that designers are typically employed as developers and doing nothing to change that, many of the participants attempted to complete development tasks they may not have been qualified to complete. Fred shared his unique perspective on this. He observed that when unqualified designers attempt to develop their own content, it often resulted in poor products. These instructional designers chose not to outsource due to their own pride, or for fear of losing their "development" job. Fred argued that these instructional designers should, instead, specialize in design and leave development to specialists.

> FRED: Some instructional designers are not okay *not* doing the development; they want to be the ones doing the development. They kind of want to be the ones that are like the one-man-band shops instead of letting go of some things . . . .. I involve specific developers, saying, "this person is really good at React, I'm going to use this person for React" or, "This person is really good at VR and 3D modeling, I'm going to use that person."

For participants in this study who did nothing when faced with frustration over job role expectations, the source of their frustration stayed constant or grew worse.

*Self-Transformation*

As Kate spent more and more time in her various curriculum development roles, she experienced a philosophical shift away from criteria-based learning. For her, training became less about learners following behavioristic steps, and more about learners growing naturally through experience.

> KATE: One shift that's kind of happening for me right now is a move away from criteria-based practicing; in the last couple years I've had a lot more projects related to [learners'] social-emotional skills, so some of the research that I've done around that, which is limited, and some other experiences that I've had – just this idea that we kind of reduce an interaction between two people to steps.

Kate also learned, after months of intense personal effort, that projects can be significantly streamlined with a little extra preparation up front.

> KATE: Sometimes, in our intensity to do the very best we can, we didn't do [projects] in a really time efficient way . . .. In the moment, you're like, "Just get this done," and after you look at it and you're like, "Wow, that was, like, several months of my life that I'm still kind of recovering from," because we couldn't commit to a plan that we could all agree on early, or we couldn't control the reviewers, or we couldn't say no to feedback.

Pepper learned over time that, for her, practical instructional design work was not about following models or theory; it was about being flexible and learning through the design process.

> PEPPER: Probably the biggest transition thing was . . . "make sure that everything is aligned with theory." As I went along [I learned] that it's more about process and walking

both the learners through the process and the product through the process, and not getting so hung up on, "Well, I made this thing, and it works just fine, so why do we change it?" Reacting to role frustration by turning to self-improvement as a pressure release can be productive. The participants who recognized the needs to change and grow in their roles were able to find ways to relieve some of the pressure and even expand the scope of their duties to take advantage of their skills.

*Environmental Transformation*

When the discomfort of mismatched expectations became unacceptable, the study participants asserted their job role expectations in three ways: 1) made small and sometimes covert changes to projects that ID practitioners "sneak in" without the other project stake holders recognizing them (without permission), 2) made changes on a project-by-project basis that require situational permission from only the team members and/or immediate manager, 3) negotiated a change in position, title, or job description for the ID practitioner that gives the ID practitioner's authority to make desired design decisions.

**When No Permission is Required.** In some instances, participants were able to squeeze in an extra part of their perceived job role into the scope of any given project without requiring special permission.

Tyler maintained his own sense of good instructional design when he agreed with project stakeholders in the meetings, but then ignored them when he went to work.

TYLER: Any time we had an objective that was affective in nature, they were just like, "Let's just cut it." And this happened multiple times on, like, multiple projects . . .. But when you talk to them, you realize that's the only thing that's missing here. Like, that's the main thing. There's a lot of resistance [from learners] on this particular topic. And

you want to make this video that's addressing that resistance—so that's a learning objective. So you kind of have to surpass them and have that objective anyway [laughs].

**When Some Permission is Required.** Some of the participants were willing to speak up to managers, co-workers, and other stakeholders on a project-by-project basis.

Valentino secretly circumvented the normal process and took on projects single-handedly as long as they were "small." This service became an underground craze.

> VALENTINO: So I got put in this *Learning Consultant role* and they said, "You can't touch Design and Development; that's Stanley's team's role," and I was like, "Well, that makes me sad because Stanley's stupid, and his team is terrible at Design." . . .. So, one day I said to my boss, "You know, once in a while people come to me with a project that's just this teeny little thing that they need really quick and . . .. I'm like, "I probably could have banged it out in a day just doing it myself . . What are your thoughts on that?" and she goes, "You know, if it's something really small . . . then I'm okay with you doing it." And I thought, "Cool. Well, at this point we have not defined 'small' or what that is." . . .. Then people were like, "Oh, hey, if you can make it a 'small project' [Valentino] can do it himself, and he's fast and he's really good, so just make sure it's "small" when you ask him for the project."

**When Extensive Permission is Required**. Four of the five participants gave examples of times when the realization of their expectations required a major effort—essentially a job re-write. However, in the end, they each felt like they were using more of their training and were more satisfied with their job.

After a year and a half of being in a toxic organizational hierarchy issue, Pepper finally negotiated a managerial role for herself and was able to confront her former peer with whom she

butted design-philosophy heads. By negotiating from a new position of power, Pepper related, "I finally had the teeth to say, 'No, Trainer, we're not going to do it that way. We're going to do it this way because it's more effective and it's more scalable.' It actually helped my relationship with the Trainer significantly."

Whether through self-improvement, or efforts to change their work environment, the internal and interpersonal conflicts resulting from role frustration eventually led the participants to make efforts to effect change and be acted upon by their employer.

**Principle 5: Role Transformation Strategy**

The five study participants used various strategies and techniques to change (or more euphemistically, "negotiate") their respective roles with the two stakeholder groups within their organizations. These stakeholder groups are: "business leaders" or those with authority or responsibility for a project but who are not directly connected with the project team, and "team members," or those directly connected with a project. Each group required a separate approach to change their views.

*Strategies for Convincing Business Leaders*

For three of the five participants, convincing "higher ups" was generally as easy as illustrating what a they, or their understanding of learning philosophy, could do for the company, and making a reasonable pitch. Occasionally, having a relationship of trust was required in order for an ID practitioner to be taken seriously. Often times, trust with higher ups was built over time through developing a reputation of working on successful projects.

Pepper recruited her businesses leaders to her way of thinking using the following quick and dirty illustration:

PEPPER: They would say, "Well, we've got all this stuff, let's just teach it all at the same time." And I would say, "No, no, nononono, you can't do that. You have to take little baby steps," and I would explain cognitive load as, "Everybody gets one hundred learning points every day . . .. And if you try to teach them more than the allotted points, they're not going to learn it at all; they're going to forget. So [if] we already used up fifty earlier with this other activity, we've only got fifty left." So . . . that helped them buy-in to the idea of spreading things out a little bit.

### *Strategies for Convincing Co-Workers*

Convincing the co-worker group was occasionally more difficult for participants because if they already had ideas of what "right" looked like, they would either (a) need the participant to be senior to them in the chain of command, (b) need science to convince them, or (c) need the participant to present them with enough strong voices to persuade them to change their view.

In some instances, team members required re-education by the instructional designer. Valentino shared a recent story of when he was in a position of authority and was able to essentially order others to follow his designs:

VALENTINO: I said to the instructional design team, "the instructions are broken into six sections . . . I want a video for each section that just shows what it looks like when you do that function in the software just because it's not a very intuitive piece of software" . . .. So, I get the product back, and there's four videos, and I said, "Where's the other two videos?" And [Stanley] goes, "Well, I mean, some of the topics seemed pretty similar, so I thought it would make more sense to combine them into a single video." And I said, "So, Stanley, explain to me: if I have a document with six sections, and you've given me four videos, what does this look like when I post this on a website?

Can you explain that to me?" And he goes, "Oh. Oh, so you do kind of need six videos."
I'm like, "That's why I freaking wrote 'six videos' in my SOW (Statement of Work) that
I gave you . . .. Just follow the freaking instructions, dude." Anyway, I hate it; it's making
me bonkers.

Valentino occasionally uses scientific design jargon to confound clients who bring him pre-
designed projects in order to reclaim authority over project design. Valentino admitted, "I ended
throwing out some of my Instructional Design-y jargon that I know they don't understand, and it
will kind of make them go, 'Oh. Alright. Uh, well, okay. Maybe we should start at the beginning
then and have you go through and make sure this is going to work for us,' and I'm like, 'Happy
to.'"

> Kate was able to sway the project design team once she "collected enough strong voices"
on her side.

> > KATE: That's an example where I've come up against [my co-workers'] really strong
> > disbelief in the learner. Like, they can't do it, and I had to really kind of talk through and
> > battle and wait for things to get approved and need[ed] to kind of collect a strong enough
> > voice of people who could trust the learners to say, "No, they can't do this and we need to
> > get out of their way.

> Once the participants asserted themselves to gain project influence or make more
enduring role changes, they developed different strategies for each of the two stakeholder
groups. For business leaders they appealed to the practical impact they or learning philosophy
could have on the business's objectives and employee morale. For co-workers they needed to
obtain sufficient authority to cause their peers to capitulate on their desired approach.

**Principle 6: Role Validation**

After entering the workforce, participants identified two ways in which they were able to glean professional validation: subjective and objective. None of this validation was the result of formal evaluation.

*Subjective Validation*

Participants felt successful when they got positive feedback from their managers, clients, co-workers, and end users (learners).

Kate felt satisfied when her boss offered her verbal congratulations on her work and thanked her for contributing her expertise.

> KATE: . . . My boss has said, "[Kate], we really want your designer expertise on this
>
> project . . .. We want you to help us think through how to do stuff on this." And so, I feel
>
> like it is really valued by my boss, knowing that this is what I studied and this is what I
>
> do.

Pepper felt successful in her job role when she received direct compliments on her training model by important business clients who came in contact with it.

> PEPPER: People like CEOs, [and] Directors of Operations . . . [said] "This is some of the
>
> best stuff that I've ever seen." Every single time we partnered with an established
>
> company they'd always say, "You're training is so far above and beyond anything I've
>
> ever seen, anything that I expected from a startup" . . .. And it felt so good.

When Pepper, Valentino, and Tyler were able to share even basic design principles with their non-designer co-workers, their minds were blown. This made the participants feel validated in their job roles.

PEPPER: I was in a meeting . . . and I would bring something up that was just low-level instructional design, very, very basic, 'learn it in your very first class in graduate school', and everyone looked at me and was like, "You are a genius. How did you think of that?"

Pepper and Fred also felt satisfied when they were able to witness learner epiphanies; when learners realized that there were better ways of doing things. Pepper said, "I love the epiphanies of, 'I haven't been doing this the best way. I should change the way I'm doing things.' That is my favorite epiphany to cultivate in somebody, and I like having that epiphany myself."

### *Objective Validation*

For some participants, producing quality materials was its own reward. Tyler was able to significantly reduce learner seat time for trainings by swapping development tools. He felt he applied appropriate design principles and it served his end users' interests. He was dismayed when he did not receive any feedback from the client regarding this shortened version of the training. Tyler wanted to say:

TYLER: "Hey, isn't this a lot better than having to sit here for forty minutes? You can get through this probably in twenty, twenty-five minutes but you get exactly the same thing out of it; isn't that great?" So nobody was commenting on it, but in a way that was kind of a success just because it was reducing the friction there.

Tyler also was able to identify when he had done a good job in his ID role when his (unrequired) learning materials are shared around the company. "If it's a really good video it gets shared around and lots of people see it, and so you can just tell that it's getting around; you're getting feedback and everyone's like, 'Oh, that [specialized] lesson – that was really great.'"

In the absence of formal evaluation due to the lack of unified ID job standards, many of the participants found validation through subjective compliments and the satisfaction that came from knowing that a quality product had been produced, delivered, and hopefully shared.

**Principle 7: Responsibility for Future Role**

Over time, each participant developed their own sense of what a satisfying work environment meant to them. Like the majority of participants, Valentino wished for more control over his company's overall learning strategy in addition to just a say on specific project designs.

> VALENTINO: I'd still love more power over the strategy that we're using, but I at least have control over the product now. And, you know, I am in a very pigeon-holed position here. I am the "e-learning guy" and so if it relates to e-learning then that's my gig in their mind, and if it's not e-learning, if it's classroom training, that is not [Valentino]'s gig.

In addition, Valentino wished for a different breakdown of his daily tasks. "I wish I was doing, like, 90% design and 10% development." "Even a 50/50 split would be amazing."

After working for both a small startup company, and for a large government organization, Pepper discovered that she thrived in a more quick-paced, messy "startup" environment. Compliance and perfection are two things she did not appreciate in her workspace. Pepper stated, "There are some people that . . . are great IDs for the compliance world, and . . . make sure it's perfect, and that's how they function. But I know that that's just not how I function."

Tyler shared his desire to find a job where he can care about the content, and lead out in the design effort.

> TYLER: I love cross-cultural learning . . .. I would actually love to be more in that situation where I was taking instructional design back to something that I really cared about . . .. I'd just love personally to be leading . . . development direction of something

valuable, and so I would certainly be involved in those early stages, like, "What kind of an impact do I want to have on the world?" . . .. Some people just love changing topics and being exposed to new things . . .. That, to me, gets kind of wearying, unless it's something I really care about myself.

Fred's job change allowed him to engage in his many interests including teaching, development, and administering learning management systems. Time in the field allowed Fred to discover that he enjoyed these roles, which became a key to his job satisfaction.

FRED: I'm just a lot happier than I was . . .. I just wanted to get more into teaching and this [new] job kind of fit everything. It kind of fit teaching, [and I'm] still doing learning and development, getting the Learning Management System, becoming an LMS admin, you know, all the stuff that I'm really interested in.

For each of the study participants, their transition into the business world seemed to be the beginning of a longer journey of embracing change as they learned to tailor their skill sets to their employer's goals. Sometimes, it meant recognizing that they were not a good fit for their company.

**Final Theme: Participant Recommendations**

Throughout their interviews, participants offered advice, suggestions, and in some cases made pleas for change directed toward three main groups: future instructional designers, graduate-level ID programs, and the business industry at large. The reader should not try to apply all of these suggestions as they originate from different participants and are not necessarily aligned with one another. In other words, they are not to be viewed as a checklist, but rather independent ideas for the reader to consider. While there were many more recommendations in the raw data, the following ones related best to the purpose of this study.

*Recommendations for Designers*

Kate shared her belief that good designers have flexible teaching/learning philosophies when working with team members.

KATE: I kind of feel like if you're not flexible . . . what good are you? Everything's changing . . . . We've got to . . . start asking, like, "are we doing all we can do and are we doing it in the most efficient way that we can for these learners at this time with the tools that we have now?"

Kate and Fred both shared stories in which they applauded instructional designers who clearly defined the ways in which they were best suited to best serve the project, and also had the courage to identify areas of personal deficiency. Additionally, Kate charged other instructional designers to not to be afraid of adopting a learning solution when they personally did not have expertise, as long as it was the best solution. "Know what you don't know and acknowledge that . . .. [you] don't actually have to know every technology or affordance . . . but [you] can find someone who [does]."

Tyler advised other instructional designers to get passionate, which would attract passionate partners and the product would ultimately benefit.

TYLER: You'll never know exactly what your job is or what your job is expected to be until you just start working on things. If you start working on it, and kind of getting passionate about things . . . you're more likely to draw that out of your partners . . .. [This] helped reinvigorate those of us who have been here for a while and kind of are stuck in our regular ruts.

Pepper advised young instructional designers to make allegiances with people throughout their organizations to accelerate their careers.

PEPPER: Learn how to make friends at work that are in your peer group and higher than your peer group . . .. Sometimes I can still be pretty intimidated by people with power, but generally . . . the thing that . . . has accelerated my career the most is making friends with people in high places and gaining their trust. Be a good member of the company community.

Pepper said good instructional designers needed to learn to be persuasive in design meetings, especially when it came to convincing stakeholders to buy in to instructionally-sound learning solutions.

PEPPER: First of all, training is generally cost-centric, and if it's not, people still think about it that way . . .. People are generally not keen on dumping a lot of money into making fantastic training, and so they dump a lot of money into making terrible training . . .. You have to have some level of power of persuasion to be able to paint a picture of what you want to create, and the reasons why that is a better option than what [already] exists.

### *Recommendations for Higher Education*

Most of Kate's graduate work was for a company that did not allow her to share her projects. Kate said it was hard to not have something to showcase her skillset to prospective employers. She wished there were a way to get around this.

KATE: If you're going to graduate in instructional design, you should have a portfolio, not just a transcript. And I kind of graduated with a transcript and then a master's project . . . [which] was confidential . . .. My project . . . couldn't be published, and so if you took that [confidential] information out, it became a non-defensible thesis, and if you left it in it was non-publishable to the public. So that's where we landed.

For the participants, there was an expected gap between what was taught in graduate programs and which skills and knowledge were asked for by employers. Kate reported a mismatch between her educational experience and its practical application.

> KATE: We have . . . this checklist-y model because we can measure it and it feels like an accomplishment, and we can kind of guarantee, "Okay, graduates can do these skills," but then when you get to the field, can . . . they all really do the skills that we have listed as the Common Core, or do they really need all those skills in their unique work assignment? There's some stuff we did in our program that I never use, and there's some stuff I sure wish we would have done in our program.

Pepper wished she had been taken as seriously at school as she was in her business setting. To her, Pepper's professors came off as all-knowing instructors, while her seniors at work felt more like peers. Pepper was admittedly sensitive to unequal power dynamics and knew she thrived best in "communities of learning" (Vygotsky, 1978).

> PEPPER: One thing that I wish I had more of in graduate school was interaction with the professors. I feel like I was working . . . where I was taken seriously as a professional and was in meetings where I could speak up and say things . . . and disagree with people who were [gestures quotations] 'senior' somehow, but I didn't ever feel like that. I lamented that I did not have that same kind of relationship with my professors.

Valentino suggested that the first two years of a graduate program should be designed to help new instructional designers get direct teaching experience. This suggestion was given in the hope that it would instill in them a desire to make an impact on the learners, and not just pump out projects.

VALENTINO: Honestly, if we ever reached a point as an industry that we got the kind of control that we would like to have, I think they should have the first year or two of ID programs be, like, a secondary education program and have people teach and stuff, and be like, "Okay, now let's teach you instructional design so that you can take all that experience, and build on it, and make it even better."

For Fred, prospective instructional designers needed to clearly understanding that businesses rarely hired instructional designers who had strong design and development skills (a.k.a. "one-person bands"). Fred recommended that one way for ID programs to prepare students for this job role distinction would be to add an e-learning development professional degree or emphasis to instructional design graduate programs. Fred offered, "I would love to have a completely different degree that's just e-learning development, that's focused end-to-end e-learning development."

### Recommendations for Industry

Valentino adamantly encouraged instructional designers to partner with management in deciding what to teach, not just how to teach it.

VALENTINO: I think really an instructional designer should be more of a partner with the management . . . to explore issues that the company is having and be able to help explore the solutions to those problems . . .. I think including instructional designers at more of that solution phase would totally open people's eyes [to what instructional designers are] capable of.

Kate firmly believed that the instructional design field could benefit from borrowing the *lean* development model for making quick changes to a project from the field of UX (User

Experience). She felt future industry needed to focus less on instructional materials and more on learner experience.

> KATE: Learning experience is what we're after and businesses have already figured this out. Like, if a customer doesn't have the right experience, they won't come back and they won't give you their money. If the learner doesn't have the right experience, they don't learn, but instead of us losing business, we just have people that don't know what they're doing . . .. The instructional designer thinks about the whole experience of the learner.

With the ever-increasing accessibility of global learning materials, Tyler expressed the hope that companies would shift their investments from creating content to curating content.

> TYLER: We just need to stop focusing on creating or developing content, but [rather on] curating things, guiding a learner through it, helping them find good sources to start with but also ushering them into a larger discussion that may be happening. That's bigger than anything that we could create ourselves. I think we've got to get past just generating content and [focus] more on improving and connecting content, and creating an experience.

Along with all other participants, Fred suggested that corporate industry create distinct roles for both designers and developers. Each of these jobs require a different set of skills. Fred argued that when companies can specialize, everything works better.

> FRED: I think it helps to understand both instructional design and e-learning development, but I think there needs to be a distinction between the two. I think it needs to be split up. I think that e-learning development is a whole different kind of realm that you need to understand, but it also helps that instructional designers understand how

development happens so they can design better for the development, so that's really my

goal with the [ID development] class.

This section considered the data directly from the interviews with participants. The participants'

multiple recommendations shared in this section are applicable to multiple stakeholders. These

applications will be further explored in the bulleted points in the following chapter. The next

chapter will discuss some of the implications of these findings in context of the current

instructional design literature.

CHAPTER 5

**Discussion**

This discussion will present the study's findings in relationship to the initial exploratory research question, the previous research findings in the literature, as well as my own interpretations of the findings. The aim of this chapter is to potentially help inform future research, and to guide meaningful change in business, ID graduation programs, and the practices of other prospective, novice, and expert IDs. This study does not, however, intend to provide universal generalizations. Rather, it attempts to illuminate the existing research by connecting meaning to the detailed accounts five instructional design practitioners' transition from their academic preparation into professional business practice.

**Reflection on Themes**

*Principle 1: Role Confusion*

As principle (theme) 1 revealed, all of the participants observed confusion surrounding their ID job roles. On one hand, this finding is intuitively unexpected given the efforts made by professional organizations, such as IBSTPI, to provide clear competencies for the academic ID field and for its business practitioners. IBSTPI's mission statement is to ". . . develop, validate and promote implementation of international standards to advance training, instruction, learning and performance improvement for individuals and organizations" (Koszalka et al., 2013). Ideally, these would be the standards that would measure the competencies of every business ID graduate worldwide throughout the course of their professional development during their career. However, based on the absence of any mention of the IBSTPI competencies in the study data during discussions of job role expectations, awareness of these IBSTPI competencies was not present in the minds of either the participants or their employers. On the other hand, the body of

ID practice literature corroborates the state of confusion regarding the definition of ID job roles in the corporate world (Corbeil & Corbeil, 2013; Kelly, 2016; Olsen, 2018). Ultimately, no one should be surprised by this finding. Both the findings and literature are in agreement that ID job role confusion is real.

### Principle 2: Role Expectation

According to the findings in principle (theme) 2, initially the participants did not generally seem bothered by accepting the job roles assigned them by their employers and team members (e.g., scriptwriters or instructional developers). Their experiences echoed the literature regarding a concern for being professionally pigeon-holed into using only a small percentage of their ID skill set.

We read in the literature that ID practitioners cannot expect to have well-defined job roles. ID role confusion was being discussed in the literature almost 20 years ago. Corbeil and Corbeil cited Grabowski's concern that confusion in the ID field may be due to a lack of identity within the discipline itself. Regarding the discipline of ID, she noted that educational technology professionals are often reluctant to define their field in order to avoid boxing themselves into specific job tasks. She speculated that educational technology programs' lack of identity was "an indication of identity crisis, mission creep, or, perhaps, both." Whether or not the instructional design field suffers from an identity crisis or mission creep, she suggested that the wound is most likely self-inflicted (Corbeil & Corbeil, 2013, p. 345).

### Principle 3: Role Frustration

Principle (theme) 3 draws attention to the fact that practitioners generally felt that their job role expectations were mismatched with their workplace realities. This desire greater alignment between ID skill sets and practical corporate ID work tasks is echoed in the literature

(Ertmer et al., 2009; Kelly, 2016; Marsee, 2015; Stefaniak et al., 2018; Villachica, et al. 2010; Wedman & Tessmer, 1993).

In practice, one of the chief complaints of study participants during their transition phase (regardless of how long that phase actually lasts) was that they did not have the desired authority, control, or power in their job roles over the design process. The participants in this study reported that frequently much of the design work had already been done by the time they were added to the project team. This finding seems to expose a glaring discrepancy between the ID's job role expectations and their reality.

This may be due to the fact that hiring managers say that certain core ID competencies are important for prospective hires, but due to their lack of awareness of the importance of the core competency of design analysis, the managers do not include them on projects at the point where those skills may be applied. According to a 2010 survey (Villachica et al., 2010), the percentages below in Table 3 indicate the proportion of hiring managers surveyed who felt like each of the IBSTPI competencies listed was important for their ID hires to possess.

**Table 3**

*Importance of Design Analysis to Hiring Managers*

| Design Analysis Skill | Percent of Hiring Managers |
| --- | --- |
| Writing performance objectives | 97% |
| Selecting or modifying content | 96% |
| Conducting a task analysis | 90% |
| Selecting appropriate media | 87% |
| Conducting a front-end analysis | 87% |

*Principle 4: Role Assertion*

According to the findings in principles (theme) 4, the participants felt an obligation to push back against frustrating stakeholder priorities. When participants got frustrated, some chose to take no action for a period of time, perhaps in fear of losing their jobs. However, in most instances they eventually asserted themselves through job role negotiation. The intensity of these efforts to push for greater control in the design process, for example, depended on how much job role frustration they were willing to endure. Each study participant reported having held between two and seven ID positions in the last ten years. The participant's extensive job change history may demonstrate that one way they dealt with job role frustration was to find another job rather than continue to try to change their organizations from within.

The literature reported that there were multiple titles and job roles posted for those with ID education. The breadth of the opportunities posted may have been a double-edged sword. On one hand, it was easier for the participants to find a job, on the other hand it was more difficult find a job that was a good fit. The literature does say that ID practitioners like to have very broad definitions of their roles in order to be attractive to employers (Larson, 2005). The fear of not having a job is greater than the potential discomfort of a clash of expectations. If the "wound" of ID practitioners boxing themselves into very broad job descriptions that lead to them being asked to do very specific job roles really is self-inflicted, then ID practitioners are the ones to initiate change.

*Principle 5: Role Transformation Strategy*

In principle (theme 5, participants shared strategies they had each developed to transform their role to be more palatable. Their strategies were commensurate with their level of frustration. According to participants, it was often easier to convince their companies' senior

leadership to make high-stakes, company-wide decisions than it was to convince their ID peers to abandon simple project design decisions. This finding was surprising, since in the literature, ID managers were generally dissatisfied with the unprepared nature of their ID hires. They claimed that many novice IDs lacked essential ID competencies (Sugar, 2014). It is clear from the participants' practical experience and suggested in the literature that hiring managers and IDs approach business problems from very different perspectives. However, the findings show that after the participants effectively communicated with their managers on the subject, the hiring managers were often pleased by the unexpected design solutions IDs brought to projects.

*Principle 6: Role Validation*

When participants were asked how they knew if they were performing well in their roles, none of them mentioned formal evaluations. This could be due to the fact that their employers did not have clear (or any) ID job role expectations for the participants. Without clear expectations there can be no objective evaluation. Each business is left to create its own role criteria.

The majority of participants reported receiving some form of validation from their managers, clients, co-workers, and end users (learners). For those participants with a teaching background, verbal congratulations were typically not enough. Their job satisfaction was all about seeing their learners achieve positive changes in their behavior and cognitive understanding—"moving the needle." As reported in the study's findings, all but two of the ways that participants measured their job validation were subjective in nature. This finding was surprising, since creating evaluations for others is a core competency of ID practitioners, one would anticipate that the participants would have expected and pushed for objective evaluations for themselves. Perhaps a reason why the participants did not discuss their job role evaluations

was because rigorous evaluation is not possible for a job that is not clearly defined. In the absence of more objective evaluation, participants sought more subjective means of role validation.

In a general review of the ID practice literature, business needs are so specific that IDs have no way to accurately prepare to satisfy them. Thus, they struggle to live up to employers' expectations (Sugar, 2014). Likewise, employers may not have been trained in the science of evaluation, nor value its importance, and are therefore not able to objectively measure the success of their employees.

### *Principle 7: Responsibility for Future Role*

Each of the study participants was able to identify personal preferences regarding their preferred work environment. For example, Kate loved to spend time with her learners. Pepper did not want to develop, just design. Valentino preferred to do it all. Tyler loved working with high-energy teams on projects. Fred loved positions that allowed him to teach and learn within the ID community. This variety in preference is reflected in the literature's open definition of the job roles of ID practitioners. This may be due to the dynamic nature of job roles based on changing business needs (Kelly, 2016; Marsee, 2015; Villachica et al., 2010). The study participants demonstrated that by taking responsibility for their professional futures, ID practitioners can meld the varied ways to achieve job satisfaction with the ever-changing demands of the business world.

### *Final Theme: Participant Recommendations*

**Summary of Recommendations for IDs.** This study yielded many recommendations for instructional designers with an array of professional experience:

1. Good IDs avoid being too rigid in their application of their teaching and learning philosophies, especially when working with other project stakeholders. Though theory is often taught with authority in school, it is not often applied in the prescriptive way it is taught (South, 2008). During their own transitions into the workplace, each of the participants gave examples of cognitive shifts away from or evolving thinking around the models and theories they espoused during their preparatory periods prior to practice. Other ID practitioners may benefit in their own transition experiences from adopting the expectation of constant internal and external change.

2. Good IDs self-assess and clearly define how they are well-suited to best serve any given project. They also have the courage to state the boundaries of their skill set. In this study, project managers often did not have a background in design, nor were they aware of their team members' specific ID skill sets. Therefore, they cannot be expected to know how to best utilize an ID's skill. The findings noted that participants who did not speak up were often relegated to ID *development* tasks. Therefore, if IDs want their skills to be more fully realized, they might consider educating their employers regarding how they can make a greater, positive impact for the business.

3. Passion is contagious. An ID with a passionate vision for a project will increase buy-in from clients and attract passionate co-workers. Since an ID may be one of the only individuals on a project team with a full vision of its potential scope and impact, they have the opportunity, and even the responsibility, to help other team members see how the team members' contributions are meaningful. If other IDs find themselves

stagnant and dissatisfied in their job roles, the application of this principle may help their credibility and give the project team a needed shot of enthusiasm.

4. IDs with a good reputation within their organization have enhanced job security. Savvy IDs make allegiances with people throughout their organizations to accelerate their careers. As in any profession, those who develop relationships across multiple networks not only have more resources to help them perform their job better, but if something were to go wrong on a project, these networkers have more social capital to draw upon, resulting in greater leniency.

5. Good IDs have and use persuasive skills with stakeholders, especially in design meetings. Project stakeholders often fight against best design practices. Higher ups are often convinced to abandon their anti-instructional-design position through verbal logic and visual illustrations. If they can see it, they get it. The participants in this study who assumed authority to effectively communicate their design vision on projects were most often met with positive feedback. Even if their idea was denied in the moment, they were seen as capable of making similar contributions in the future. However, participants who failed to speak up felt professionally stymied and pigeon-holed into performing tasks that did not fully utilize their ID skill set.

**Summary of Recommendations for ID Graduate Programs.** This study yielded many recommendations for ID graduate programs:

1. Due to the dynamic nature of technologies in the business industry, the unique business needs of each company, and the corresponding confusion surrounding ID job roles and their individual preferences and skills, graduate ID programs cannot predict what challenges their business-bound ID graduates will encounter upon entering the

workforce. This study's findings suggest that graduate ID programs may not be capable of fully preparing students to meet their future employer's specific needs, nor navigate difficult work relationships. That being said, the more that can be done to bridge the gap between theory and practice, the better prepared ID students will be. This can be done at many levels within a university graduate ID program:

- Departments might create an IBSTPI-inspired "student competency card" or digital credentials (e.g., "badges") that would be included in the materials provided to employers offering student internship. This would serve to inform the potential employer of which skills the student is already proficient in and which they are seeking to further develop. It could also raise awareness in the business community of the IBSTPI competencies.

- Professors might choose to implement a service-learning approach to course curricula, partnering with local business, matching the business's current needs with semester-long course solutions.

- On an individual level, professors may require students to job shadow potential future employers, having them observe ID-related issues that arise in the business setting, and bring that discussion back to the classroom.

2. Encourage ID graduates entering the business world to have ways to showcase their skills. This is especially critical for prospective IDs whose project work in school is confidential. As noted in theme four: role assertion, employers and those with decision making power were moved by IDs' visual illustrations of what could be. University faculty might encourage students to save their project work to use as examples when talking to future employers.

3. Be more aware of students' sensitivity to power imbalance in the classroom. The "sage on the stage" mentality of some instructors may inhibit student engagement and could even be viewed as less effective with students who are more comfortable participating as equal members in a community of learning (Vygotsky, 1978).

4. The first two years of a graduate program should include providing prospective IDs with direct teaching experience. Three of the five participants had strong classroom teaching backgrounds. These participants carried with them their internal motivation to help their learners improve from the classroom to the business setting. They felt frustrated with fellow IDs who were only interested in completing projects, seemingly unaffected by the impact on the learner. According to these three participants, if attentiveness to learner growth is not important to a prospective ID, they ought to re-examine their career choices.

5. ID programs could add an e-learning development professional degree for prospective IDs who want to market themselves as "one-person bands." A separate degree (or that emphasis to an existing degree) in e-learning development could assist the industry in distinguishing between *design* and *development* roles.

**Summary Recommendations for Business.** This study yielded many recommendations for businesses who hire instructional designers. Since business leaders are unlikely to find these suggestions on their own, IDs within companies may benefit (themselves and their organizations) from sharing these findings with their employers:

1. Recognize that IDs are trained to create and implement company-wide learning philosophies and empower them to do so.

2. Consider modifying project processes to give IDs authority over *what* to teach, not just *how* to teach.

3. Explore the benefits of the *lean development* model, borrowed from the User Experience field, in ID practice.

4. Consider making a shift in the company's learning infrastructure from content creation to content *curation.* One way in which businesses can take advantage of Web 2.0 benefits is by moving from an LMS (Learning Management System) to an LXP (Learning Experience Platform), which allows employees to track their learning from multiple sources, instead of just on their company's server. This shift will also facilitate the eventual incorporation of Web 3.0, involving AI-curated content.

5. Businesses can reap the resource-saving benefits of job role specialization by using the "assembly-line-model" to create distinct roles for instructional designers and instructional developers. In an assembly-line-model, IDs can start working on a new project's design while the developer is working on the previous project. Fred gave the following personal example: a *designer* took 80 hours to build a simple course that he (a developer) could've done in 10 hours.

*General Reflection*

One of the unexpected and larger contributions of this study was the discovery of the ID practitioner transformation framework. Upon examining each of the five participant's transition experiences, certain themes were woven throughout. Upon entering the world of instructional design practice, participants were hired to fulfill unique and disparate job roles, many of which did not align with their own expectations. The resulting clash often resulted in frustration and job dissatisfaction. The experiences of participants in this study suggest that these feelings were able

to be resolved through self-growth and negotiating their given job roles to better match these expectations. The more time spent doing ID work, the more participants found validation and clarity regarding their ideal work environments. As a result of these stages of transformation, participants had recommendations for other instructional designers, graduate-level ID programs, and industry at large.

All these themes have one common thread—uncertainty and change, for a long time. In fact, there did not seem to be an end to the change, which is why I shift away from using the word *transition* in favor of the word *transformation*. After closely examining the initial few years of transition from the world of education to the world of business, it appears that this initial phase is just the start of a lifetime of responding to continual change. The participants reported that during their decade or more of engagement in the ID field, they have been in a constant state of transformation; learning, and helping others learn. In relation to the research question, participants have never stopped "transitioning," but continue as part of their life plan to match their current skills, preferences, and desires to the demands of their workplace.

This study revealed that, from the participants' own perspectives, that they have strong and underappreciated ID skills and are flexible in their application. The participants were constantly learning how to adjust to business needs. They reported that they were modifying their own design processes based on past experience and emerging theory. This is in contrast to the literature, which reflects hiring managers' perception that many IDs are incompetent when compared to the IBSTPI standards. In fact, this study seems to be telling the opposite story—that their managers are the unaware or incompetent ones. From the participants' perspectives, each ID had numerous ideas of how their respective job roles could be improved, and how they—if

utilized differently—could increase their companies' bottom lines. The resulting confusion seems to stem from a miscommunication of expectations between IDs and their employers.

**Limitations**

The literature review for this study focused on the transition of IDs from their formal preparations (e.g., ID graduate programs for four of the five participants) into the business world. The literature was mostly quantitative in nature, which led me to examine the topic from a qualitative standpoint. As far as I am aware, there are no other qualitative, exploratory studies on this topic—ID transition to the workplace. More research, both qualitative and quantitative in nature, could be performed to further understand the personal and professional development of ID practitioners.

While this study attempted to include participants with varied backgrounds and experience levels in the field of ID, there are three ways in which I could have broadened participant selection diversification in an effort to gather additional unique transition experiences. The first two were that all the participants had homogenous racial and geographic characteristics, identifying as Caucasian U.S. citizens living in the Western United States. Greater racial and geographic diversity would have potentially added new insights into the lived experience of instructional designers transitioning into the workplace. Unfortunately, I couldn't find any willing participants that met these criteria. Third, it would have been interesting have included someone like a CLO (Chief Learning Officer) who had greater than 20 years of experience in the ID field. Their unique position of authority might have added understanding of the tension the other participants experienced in their allegiances among stakeholders, learners, and sound design principles (explored in Theme 3: Role Frustration). However, after considering the inclusion of these more-experienced participants during this study's design phase, I decided

to focus on the few years of transition immediately following the ID's formal preparations in order to keep the study scope manageable. I also considered the possibilities that older prospective participants might not be able to accurately remember their earlier years in the field. Future research can expand upon this issue.

During the interview data collection process, the interviewer failed to invite participants to clearly indicate *at what point in time* they held various beliefs—a critical issue when examining the topic of transitioning. A more definite timeline of participant experiences and the evolution of their beliefs may have offered more accurate or new insights into their respective transition experiences.

A more holistic account of the participants' transition into the workplace would have provided deeper, richer understanding of the phenomenon. Using additional methods such as literal, persistent observation of their practical work lives, and real-time examination of their work artifacts would have greatly added to this study, offering a more accurate account of their transition experience.

Interviews were the primary method of inquiry of this study. I asked participants to share work-related artifacts, in order to help substantiate and triangulate the interview data. However, only three artifacts were submitted. Only one of which (Figure 2) was significantly helpful in enriching the understanding of the participant's transitional experience. The other artifacts were examples of drafted design projects and an old job listing. After initial analysis, these did not contribute to this study's findings.

Additionally, instructional designers were the sole participants of this study. Interviewing others, such as managers, clients, or co-workers could provide a more well-rounded story, offering new perspectives and insights. Interviewing prospective IDs and their instructors could

provide important triangulation of ID practitioners' job role expectations and potential frustrations inherent in the business world. Finally, theorists might have been interviewed for their thoughts regarding the transition of instructional designers into the workplace. Their views regarding how to help business and industry adopt the established academic instructional designer role expectations, such as the IBSTPI competencies, may be informative.

Finally, researchers have a tremendous opportunity to validate the ID practitioner transformation framework outlined in the findings chapter. While these themes were all true for the five participants in this qualitative exploration study, it would benefit the field greatly to see if these themes resonate with instructional designers universally.

**Conclusion**

This study considered the question: Once immersed in everyday practice, how do IDs navigate the transition from completing their formal preparations to workplace life? The key contributions that emerged from the review of the ID practice literature and the findings of this study are as follows:

- There is no other exploratory research in the existing body of ID practice literature on the topic of the *transition* of ID practitioners from their formal preparation to their business practice. This study fills a gap in a vast body of quantitative research on ID practice spanning the past 30 years.

- In response to the research question, one of the overarching implications of this study is that there are no quick fixes to "arrive" at ID competency in practice. Rather, IDs— beyond this study—may go through connected stages of transformation that appear to be cyclical and never ending (see Table 2).

- This study's findings offer several practical recommendations for consideration by other IDs, graduate ID programs, and businesses who hire ID graduates. Perhaps, the most important for each of these three stakeholders being:

  o IDs: avoid dogmatic design thinking, make others aware of your potential contributions to the organization, know that every job is different, and it is the designer's responsibility to find a role that fits their skills and interests.

  o Graduate ID programs: it is futile to attempt to tailor a graduate ID program to meet existing business needs. Businesses do not know what they want, need, or necessarily what is good for them from a design perspective, which is the value of bringing in a formally trained ID—to help them from the inside. The closer graduate ID programs can tie curricula to real-world experiences, the better prepared students will be.

  o Businesses who hire IDs: listen to the professional instructional designers that they hire regarding design decisions. Incorporating instructional designers earlier in the design process may result in significant savings of both time and resources.

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APPENDIX A

**Example Interview Protocol**

This protocol includes semi-structured interview questions loosely based on an interview protocol as provided in Smith and Osborn, 2003 (Smith, J. A., & Osborn, M. [2003]. Interpretative phenomenological analysis. In J. Smith (Ed.), *Qualitative psychology: A practical guide to research methods* (pp. 51-80). Sage Publications).

First Interview: Worlds of Learning

A. Background

    a. What got you into the field of ID? (Prompt: pre-field skills/interests, how introduced to the field, order of experience in the field, graduate school)

    b. How do you describe yourself as an ID? (Prompts: personal attributes/characteristics, outlook on profession)

    c. What do you look like when you are interacting at your best with others in a professional setting? (Prompts: perceived by family/friends/co-workers, describe the style of your successful interactions)

B. Preparation

    a. Thinking back to your graduate school experience,

        i. What was your graduate school experience like? (Prompts: coursework, internships, effectiveness, professors, students)

        ii. Did do you feel your program prepared you for a career as an ID? How? To what degree? (Prompts: concerns/confidence, expectations of profession, view of teaching, development of skills/attitudes)

1. What were some particularly memorable experiences (good or bad) working in these ID roles?

   a. Which courses did you find the most helpful to your professional career? (Prompts: keyed-in professors, practical classes)

2. Which skills taught were the most helpful upon graduating? (Prompts: activities you continue to recall and use, competencies that define your daily tasks, if having trouble thinking of skills, have them circle the IBSTPI standards they do not use or do, and then explore those)

3. Which concepts, if any, have stuck with you that you use in your workplace today? (Prompts: ideas, models, theories still use regularly)

4. Were you taught anything that you have not yet used? (Prompts: why did I have to take that class? I haven't used that)

5. Were there any courses, skills, or concepts that were actually unhelpful, which you had to unlearned or be re-taught? (Prompts: fights, conflict, contention, discord)

C. Practice

   a. What jobs have you had since graduating? (Prompts: titles, roles)

   b. What do they have you do at your jobs? (Prompts: responsibilities, differentiate from teammates)

c. Describe your learning curve for the companies you've worked for. For example, if you were not already completely qualified for your job, what new skills did you need to develop?

d. What were some particularly memorable experiences (good or bad) working in these ID roles?

e. What skills or concepts did you have to pick up on the job to fulfill your role in the company?

f. From your perspective, which "real world" preparations would you say were most important to your faculty?

g. If you could prepare your own curriculum to prepare you for your current job experience, what skills and concepts would you emphasize?

h. What preparations did you think you would need while still in school, but you have not found to have practical use in your work?

D. Transition

a. Describe your transition to moving to full-time employment upon graduating. (Prompts: perceived benefits/advantages, concerns/fears, ideals)

b. If you had to put a percentage on how much of your graduate school preparations you are actually using in your current role, what would it be? Tell me about that.

c. How, if at all, would you change the formal training experience for other prospective IDs following in your footsteps?

Second Interview: Follow up

A. Making Meaning Out of Concerns

    a.  For interviewer: Pull out relevant quotes from the previous interview and ask reflective questions such as:

        i.  What did you mean when you said . . .

        ii.  Can you tell me more about . . . [experience or concern]?

        iii.  How has your attitude about . . . [experience or concern] changed?

    b.  For the interviewer: Allow the participant to reflect on their overall experience with concerns in teaching by asking questions such as:

        i.  What, if anything, have you learned about yourself as you've participated in this study? (Prompts: corrections to previously used artifacts, new learning models, insights into teamwork, your job role)

        ii.  How would you describe your development as a teacher over the course of your career?

        iii.  Have you had concerns as you've learned the ropes? How did you deal with them?

        iv.  Has your professional approach changed as you've gained experience? If so, how?

        v.  Do you wish anything were different in your organization to make your job easier?

Third Interview: Conclusion

  A.  For the interviewer: Final clarifications of what was shared previously in light of new information.

  B.  For the interviewer: Address any new themes or patterns that have emerged.

  C.  Is there anything else that you wanted to share? (This is where the gems are!)

APPENDIX B

**IRB Approval Letter**



**Memorandum**

To: Stephen Yanchar
Department: BYU - EDUC - Instructional Psychology & Technology
From: Sandee Aina, MPA, HRPP Manager
      Wayne Larsen, MAcc, IRB Administrator
      Bob Ridge, PhD, IRB Chair
Date: April 27, 2020
IRB#: IRB2020-184
Title: A Qualitative Exploration of the Lives of Novice Instructional Designers: The Transition from Preparation to Practice

Brigham Young University's IRB has approved the research study referenced in the subject heading as exempt level, category 2.
This category does not require an annual continuing review. Each year near the anniversary of the approval date, you will receive an email reminding you of your obligations as a researcher and to check on the status of the study. You will receive this email each year until you close the study.

The study is approved as of 04/27/2020. Please reference your assigned IRB identification number in any correspondence with the IRB.

Continued approval is conditional upon your compliance with the following requirements:

1. A copy of the approved informed consent statement can be found in iRIS. No other consent statement should be used. Each research subject must be provided with a copy or a way to access the consent statement.
2. Any modifications to the approved protocol must be submitted, reviewed, and approved by the IRB before modifications are incorporated in the study.
3. All recruiting tools must be submitted and approved by the IRB prior to use.
4. Instructions to access approved documents, submit modfications, report adverse events, can be found on the IRB website, iRIS guide: http://orca.byu.edu/irb/iRIS/story_html5.html
5. All non-serious unanticipated problems should be reported to the IRB within 2 weeks of the first awareness of the problem by the PI. Prompt reporting is important, as unanticipated problems often require some modification of study procedures, protocols, and/or informed consent processes. Such modifications require the review and approval of the IRB. Please refer to the IRB website for more information.