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Competencies of expert web-based instruction designers

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COMPETENCIES OF EXPERT WEB-BASED INSTRUCTION DESIGNERS

by

YONGHUI CHEN

DISSERTATION

Submitted to the Graduate School

of Wayne State University,

Detroit, Michigan

in partial fulfillment of the requirements

for the degree of

DOCTOR OF EDUCATION

2012

MAJOR: INSTRUCTIONAL TECHNOLOGY

Approved by:

Advisor

Date

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DEDICATION

To my husband Hantao Wang

For your love and support

That nourished my body and soul

In those long draining hours

I made it because of you

To my children Zixiao and Ming

For your willing hands and ready hearts

So understanding and accepting

I cherish your growth with me

To my parents Zhongming and Xianjin

Who gave me inspiration and spirits

To fulfill this dream of mine and yours

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CHAPTER 1 INTRODUCTION

Statement of the Problem

Web-based instruction (WBI) is becoming increasingly popular. With the emergence of Internet in the late 1980's, as well as major developments in personal computer technology, it was estimated that two million students were taking post-secondary courses that were fully delivered online (Picciano, 2002). Clark (2008) reported that a near one-third training by 2006 was delivered via Internet, intranets, and CD-ROM, which was about three-time increase compared with 2001. The online courses offered by Global University, based in Missouri, reached 600,000 students in 145 countries (Roger et al., 2007). The growth was described as “explosive in almost all sectors” (Moller et al., 2008, p. 70). However, a significant proportion of WBI products is not encouraging (Oliver, 2006). As Piskurich, Beckschi & Hall (2002) commented, too many technology-based courses, including interactive multimedia WBI courses, “are mediocre at best” (p. 1). Moller et al. (2008) asserted that “mediocrity becomes the norm” (p. 71) and has been hurting everyone. One of the faults could lie in the instructional designers. They may sacrifice long-term learning outcomes in order to meet stakeholders’ short-term needs. Or they may lack the required competencies related to the teaching and learning process (Williams, 2002). Because technology entails major changes in the way education is designed and delivered, lack of training in this field is one of the frustrations in this new teaching and learning environment (Simon, 2003; ASTD, 2010). The ASTD/i4cp Instructional Systems Design Survey (2010) revealed that top barrier to effective ISD was the shortage of professionals who “have the

competencies and skills required to meet the needs of a learning initiative” (p. 24). “New competencies are needed for survival in the information age” (Simon, 2003, p, 11).

In response to these needs, this study attempted to identify the competencies for expert instructional designers who specialize in WBI. It was one of the hopes of this study to identify the relative importance of each competency in the competency set of expert instructional designers in order to produce a top quality Web-based instructional product.

Defining Web-Based Instruction

The term Web-based instruction (WBI) has been used to refer to any kind of instruction or training that is delivered via a network (Williams, 2002). More specifically, Carliner (1999) described WBI as a form of instruction or a course available on an intranet, or Internet that is linked to learning resources outside the course, such as electronic references, electronic mail, electronic discussion, and video conferencing. Khan (1997) defined WBI as “a hypermedia based instructional programme which utilizes the attributes and resources of the World Wide Web to create a meaningful learning environment where learning is fostered and supported” (p. 6). A WBI course or program provides flexible environment for instructors and learners through the delivery of non-linear learning, and offers freedom of controlling learning pace (Clewley et al., 2011). In short, WBI carries the power of the Web (Driscoll, 1998) and the interactive advantage of the computers (Schlosser & Simonson, 2002). Learning may take place asynchronously and/or synchronously with instruction (Dempsey & Van Eck, 2002). In

recent years, eLearning has become a popular term; it is sometimes used interchangeably with WBI (Comstock, 2010).

Factors Impacting Current WBI

Despite the advantages and attention, WBI has experienced problems and challenges. At the inception of WBI, administrators and policymakers were once cautiously approaching the adoption of such technology-mediated instruction (Phipps & Merisotis, 1999). This skepticism and reluctance could be due to the high dropout rate. In higher education settings, WBI had a significantly higher incompleteness rate (32%) than the on-campus students (4%) (Phipps, Wellman & Merisotis, 1998). Other criticisms came from the lack of attention and support for learners (Driscoll, 1998), usability issues (Henke, 2001), and information overload in asynchronous learning (Picciano, 2002). With organizations embracing WBI enthusiastically, the challenge shifted from the willingness of acceptance to the speed of keeping up with emerging technologies and matching skills (Moller et al., 2008).

The ASTD Handbook of Training Design and Delivery (Piskurich, Beckschi, & Hall, 2000) identified the problems causing the ineffectiveness of WBI:

- Politics, such as sacrificing end users' needs on the basis of the power of some individuals;
- Design, such as inadequate learning principle considerations;
- Production, such as the focus on superficial visual quality rather than the overriding objectives of the program;
- Project management, such as budget and scheduling;

- Process, such as inadequate means to create early end user buy-in, and missing opportunity to implement late-arriving good design ideas resulting in mediocre products.

Ten years later, ASTD conducted a 2010 survey study. It revealed five critical barriers to effective ISD (p. 23):

- Lack of internal staff who are able to meet the needs of the ISD initiatives;
- Lack of proper funding for the right tool;
- Inability to measure the effectiveness of ISD;
- Keeping up with emerging technologies; and
- Difficulty of developing content specific to different geographical locations.

Among all the factors that impact WBI, instructional system design is considered to be most critical for effective Web-based instruction/training. “Particularly important to the effectiveness of Web-based training is the element of design” (Williams, 2002, p. 134). The following diagram lists the four factors that affect the WBI design process:

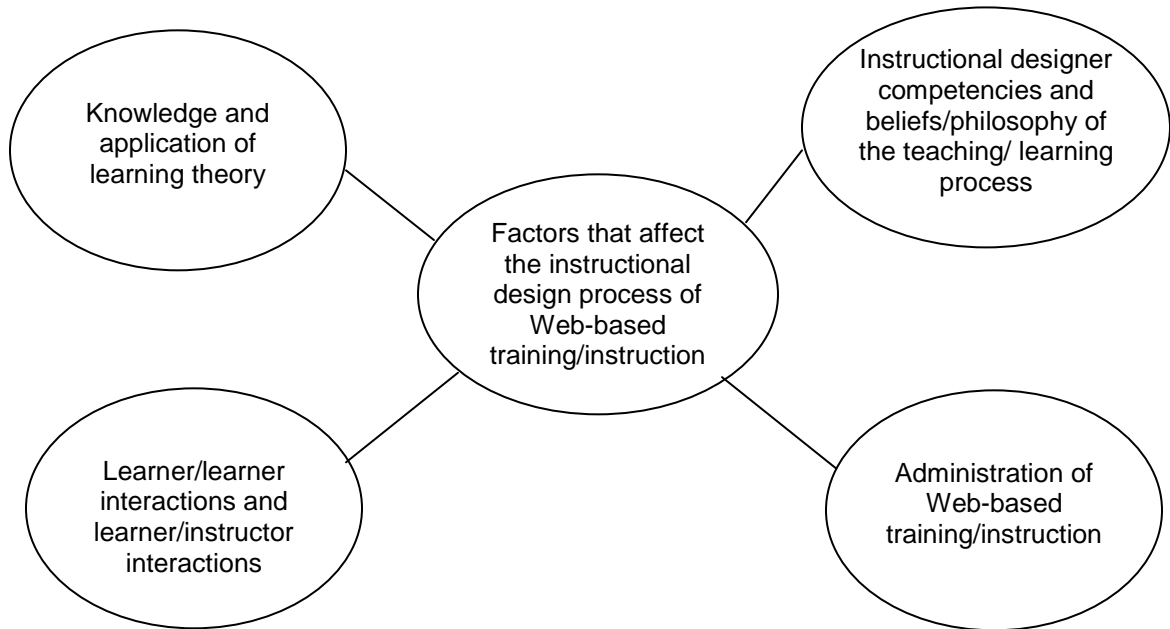


Figure 1. Factors that Affect the Instructional Design Process of Web-Based Training/Instruction¹

Williams (2002) elaborated on the learning theories critical for the effective WBI design and the barriers that impeded the successful delivery of WBI from learners' perspective. She identified 36 learning principles and three interaction elements. It was not the focus of her study to identify the competencies for instructional designers in WBI. She agreed with Russ-Eft (1994) that WBI instructional designers who do not possess adult learning competencies and cannot apply them in a Web-based environment will impede successful WBI.

The Nature of Competency

Competency as a concept has been in existence in various forms since the early 1960s (Simpson, 2006). While competence is a state of being well qualified to accomplish an activity, task or job function, competency refers to the way that a state of competence can be demonstrated to the relevant organization (Spector & de la Teja, 2001). The idea of defining a set of competencies for each job in the organization may

¹ From "Instructional Design Factors and the Effectiveness of Web-based Training/Instruction" by S. Williams, 2002, p. 132. Copyright 2002 by Sandra Wall Williams.

mislead people by focusing on behaviors rather than on accomplishments (Gilbert, 1995). Gilbert (1995) concluded that accomplishment is worthy and valuable only when “the results the person produces [that] have values to the organization” (p. 44). Likewise, Simpson (2006), working in human resource management, claims, “Competencies are related to the job not the person” (p. 1). More precisely, what really matters is the individual outputs or accomplishments that lead to achievement of organizational goals (Teodorescu & Binder, 2004).

In accordance with Gilbert’s argument, Esque and Gilbert (1995) defined competence as the “behaviors that assist the performer to overcome known barriers to achieving the performance standards” (p. 46). This definition captures not only the behavioral nature of competency, but also its value to the organization. The International Board of Standards for Training, Performance and Instruction (IBSTPI) incorporates another element, attitude, into its definition:

...a knowledge, skill, or attitude that enables one to effectively perform the activities of a given occupation or function to the standards expected in employment. (Richey, Fields & Foxon, 2001, p. 31)

IBSTPI’s definition was used in this study when discussing the expert instructional designer competencies.

Conceptual Framework of this Study

To identify and document competencies in a given function, competency modeling comes into play (Marrelli, 1998). Competency modeling refers to methods and the process of identifying and analyzing required competencies (Teodorescu & Binder, 2004). Diverse methods are used in competency modeling, including focus groups/expert panels, critical incident interviews, surveys, competencies databases, and observations.

As a continuous process, Marrelli (1998) recommended 11 steps for a successful competency analysis and modeling. Among those steps are selecting and applying a competency model to as small unit as a single job or as large unit as an entire organization. She went on to define a competency model as an “organization of identified competencies into a conceptual framework that enables the people in an organization to understand, talk about, and apply the competencies” (Marrelli, 1998, p. 10).

This study adopted the IBSTPI competency model, in Figure 2, to identify the full range of competencies commonly found in a group of expert instructional designers working in the WBI area.

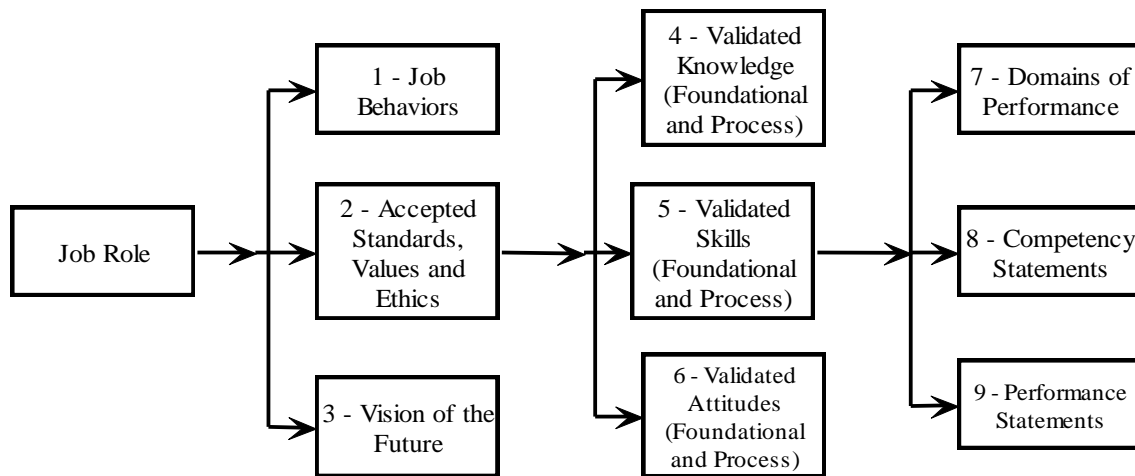


Figure 2. The Generic IBSTPI Competency Development Model².

According to the IBSTPI model, job behaviors, accepted standards, values, ethics, and vision determine the core competencies required in an organization. Validated knowledge, skills and attitudes are shown in clusters or categories of competencies critical to a particular job role. They are elaborated and additionally detailed in competency statements and their related performance statements.

² From “Instructional Design Competencies: The Standards” by R. C. Richey, D. C. Fields, and M. Foxon, 2001, p. 33. Copyright 2001 by ERIC Clearinghouse on Information & Technology.

Domains, competencies and performance statements are the three structural components included in the IBSTPI model of instructional design (ID) competencies. Competencies and performance statements are grouped in domains that parallel a systematic ID process – planning and analysis, design and development, implementation and management. A professional foundations domain is then added. This model is applicable to instructional designers working in a variety of contexts.

Expert Designers

“Instructional designers are expected to demonstrate characteristics of expertise in their professional practice” (Le Maistre, 1998, p. 21). The studies of expertise seek to understand and account for what distinguishes outstanding individuals in a domain from less outstanding individuals in that domain” (Ericsson & Smith, 1991, p.2). Those studies were mostly domain specific; however, there are many characteristics that experts share across domains to certain degree (Patel, Kaufman, & Magder, 1996).

Chi, Glaser & Farr (1988) analyzed the performance of experts and can be summarized as follows:

- Experts have a rich, well-organized knowledge base in the domain.
- Experts represent problems at a deeper level than novices do.
- Experts perform an extensive problem analysis.
- Experts have superior short-term and long-term memory.
- Experts detect large, meaningful patterns in a problem.
- Experts have excellent self-monitoring skills.

Supplementing Chi, Glaser and Farr’s analysis, Shanteau (1992) also identified five psychological strategies that experts use:

1. Constantly adjusting their decisions;
2. Using help from others;
3. Obtaining decision aids;
4. Avoiding big mistakes, but accepting small errors; and
5. Decomposing a problem into manageable parts.

Concurring with Chase and Simon's (1973) finding, Ericsson (1996) supported the 10-year rule; however, "10 years of experience in a domain does not guarantee that expert performance is attained" (p.10). The expert performance is attained gradually over intense and deliberate preparation and practice. Moreover, it was observed that the maximal performance is relative to the level of other performances of that time as many individuals in a domain often match and even surpass the past level of performance in history (Ericsson, 1996).

The idea of using expert performers as role models to improve performance in an organization is not new. Large companies, such as Bell Labs, Du Pont, Sprint, and Unigate have adopted the expert performance model to improve their work forces (Froiland, 1993).

While industries use expert model to increase productivity, this study attempts to advocate optimal performance by focusing on identifying the expert level of instructional design. Considering the high demands and low quality of some WBI courses or programs, we need to renew the emphasis on developing competencies for ISD in the WBI field (Moller et al, 2008).

Purpose of the Study

The purpose of this study was to use the IBSTPI competency model to identify the competencies commonly existing in expert instructional designers who specialize in WBI. The research questions answered by this study are:

1. What are the domains in which expert instructional designers in WBI function?
2. What are the competencies that expert instructional designers WBI demonstrate?
3. What performance statements support each competency of expert instructional designers in WBI?
4. To what extent is the importance of each competency rated?
5. To what extent does the work environment impact competencies and performance statements?
6. What direction do expert instructional designers anticipate for WBI that may impact practitioners in WBI?

Definition of Terms

Web-based instruction. A hypermedia-based instructional program which utilizes the attributes and resources of the World Wide Web to create a meaningful environment, where learning is fostered and supported (Khan, 1997).

Competency. A knowledge, skill, or attitude that enables one to effectively perform the activities of a given occupation or function to the standards expected in employment (Richey, Fields & Foxon, 2001, p.31).

Performance statement. A detailed explanation of activities comprising a competency statement (Richey, Fields & Foxon, 2001, p.183).

Competency model. The organization of identified competencies into a conceptual framework that enables the people in an organization to understand, talk about, and apply the competencies (Marrelli, 1998, p.10).

Expert. An individual with the special skill or knowledge representing mastery of a particular subject through education and experience and demonstrating high level of competencies in practice.

Significance of the Study

Since the emergence of technology-based instruction, a new set of variables are being discovered and understood in terms of analyzing, designing, developing, implementing and managing WBI (Adams, 1992). The existing research extensively addressed the general effectiveness of WBI as compared to conventional instruction. Researches have been interested in identifying competencies required of instructional designers to produce effective instruction. Such interest was not particularly targeting on competencies for WBI. With the growing needs for WBI in many business sectors all over the world, clarification of these competencies and standards is thus called for (Guerra, 2001). It was hoped that the current understanding of effective WBI would be expanded to some extent by this study. The benefits of this research were two-fold: 1) to help organizations or groups interested in WBI ventures find the star performers, and 2) to help individuals grow and determine if they are competent enough to seek an advanced ID position in WBI.

Other than employee selection, competency modeling has many applications in the workplace, including employee career development, and determining rewards and compensation (Marrelli, 1998). With standards and competencies unambiguously identified in measurable behavioral statements, management personnel can use them to evaluate and “officially recognize the achievements a professional has made in his or her area of practice” (Stolovitch, Keeps & Rodrigue, 1999, p. 683). Organizational training curricula and academic degree curricula will also be able to use such competencies as guidelines for the preparation of future expert designers (Guerra, 2001; Larson, 2004; Hansen, 2010). This study was a response to both of the above needs. The results of this study can be used to help individuals, organizations, the professional society, and academic programs excel in the long run.

CHAPTER 2 REVIEW OF LITERATURE

This review of related research addresses previous competency studies and relevant research in the instructional design field. This review will highlight endeavors of competency modeling in ID, and move onto research efforts on identifying competencies among experts, including experts in instructional design and experts in other related practices.

IBSTPI Study

The International Board of Standards for Training, Performance and Instruction (IBSTPI) is a non-profit corporation organized in 1984 to develop standards in the area of training, performance and instruction. IBSTPI has published various competencies and performance statements. The three major projects and publications (<http://www.ibstpi.org>) are:

- *Instructional Design Competencies: The Standards* (initially developed in 1986 and revised in 2000);
- *Instructor Competencies* (first published in 1993, then again in 2003); and
- *Training Manager Competencies: The Standards* (originally set in 1989, completed a new set in 2001).

According to Richey, et al (2000), the 2000 IBSTPI ID competencies were supported by the following research and studies:

- The Atchison (1996) and Song (1998) studies that identified expert instructional designers' roles and competencies.
- The research that generated original 16 IBSTPI ID competencies.

- The focus groups of the 15 IBSTPI board members.
- Validation research and findings of the base competency list.
- Review and revision by the IBSTPI Board of Directors.

Table 1 shows three editions of competencies for instructional designers - the initial 16 core competencies developed by the joint task force, the 1986 version of IBSTPI ID competencies, and the 2000 version of IBSTPI ID competencies. The 2000 ID competencies have 23 updated competencies. All the competencies are “clustered into four general domains and are supported by 122 performance statements” (Richey, Fields & Foxon, 2001, p. 45). The four domains are professional foundations, planning and analysis, design and development, and implementation and management. The more notable feature is the distinction between essential and advanced competencies. “The earlier edition attempted to identify the basic set of competencies that all experienced instructional designers should possess. The present distinction between essential skills that apply to all instructional designers and advanced skills, is useful” (Keller, 2001, p. 108).

Richey, et al (2001) included four specialist roles in ID field. They are analysts, evaluators, eLearning specialists, and project managers. ELearning specialists are development-focused (Richey, Fields & Foxon, 2001). The study differs from the IBSTPI study by focusing on competencies of expert instructional designers who have been involved in all phases of a WBI project.

Table 1
Three Editions of ID Competencies for Instructional Designers by AECT/NSPI and IBSTPI

Joint Certification Task Force (AECT/NSPI)	IBSTPI 1986 Version	IBSTPI 2000 Version
<ul style="list-style-type: none"> • Determine projects appropriate for instructional development • Conduct needs assessment • Assess learner characteristics • Analyze the structural characteristics of jobs, tasks, and content • Write statements of learner outcomes • Analyze the characteristics of the learning environment • Sequence learner outcomes • Specify instructional strategies • Sequence learner activities • Determine instructional resources (media) appropriate to instructional objectives • Evaluate instruction/training • Create course, training package, and workshop management systems • Plan and monitor instructional design projects • Communicate effectively in visual, oral, and written form • Demonstrate appropriate interpersonal, group process, and consulting behaviors • Promote the diffusion and adoption of instructional development process 	<ul style="list-style-type: none"> • Determine projects that are appropriate for instructional design • Conduct a needs assessment • Assess the relevant characteristics of learners/trainers • Analyze the characteristics of a setting • Perform job, task, and/or content analysis • Write statements of performance objectives • Develop the performance measurements • Sequence the performance objectives • Specify the instructional strategies • Design the instructional materials • Evaluate the instruction/training • Design the instructional management system • Plan and monitor instructional design projects • Communicate effectively in visual, oral, and written form • Interact effectively with other people • Promote the use of instructional design 	<p>Professional Foundations:</p> <ul style="list-style-type: none"> • Communicate effectively in visual, oral and written form. (Essential) • Apply current research and theory to the practice of instructional design. (Advanced) • Update and improve one's knowledge, skills and attitudes pertaining to instructional design and related fields. (Essential) • Apply fundamental research skills to instructional design projects. (Advanced) • Identify and resolve ethical and legal implications of design in the work place. (Advanced) <p>Planning and Analysis:</p> <ul style="list-style-type: none"> • Conduct a needs assessment. (Essential) • Design a curriculum or program. (Essential) • Select and use a variety of techniques for determining instructional content. (Essential) • Identify and describe target population characteristics. (Essential) • Analyze the characteristics of the environment. (Essential) • Analyze the characteristics of existing and emerging technologies and their use in an instructional environment. (Essential) • Reflect upon the elements of a situation before finalizing design solutions and strategies. (Essential)

(table continues)

Table 1 (continued)

Joint Certification Task Force (AECT/NSPI)	IBSTPI 1986 Version	IBSTPI 2000 Version
		<p data-bbox="964 369 1243 399">Design and Development:</p> <ul data-bbox="964 432 1419 957" style="list-style-type: none"> • Select, modify, or create a design and development model appropriate for a given project. (Advanced) • Select and use a variety of techniques to define and sequence the instructional content and strategies. (Essential) • Select or modify existing instructional materials. (Essential) • Develop instructional materials. (Essential) • Design instruction that reflects an understanding of the diversity of learners and groups of learners. (Essential) • Evaluate and assess instruction and its impact. (Essential) <p data-bbox="964 991 1334 1020">Implementation and Management:</p> <ul data-bbox="964 1024 1419 1423" style="list-style-type: none"> • Plan and manage instructional design projects. (Advanced) • Promote collaboration, partnerships and relationships among the participants in a design project. (Advanced) • Apply business skills to managing instructional design. (Advanced) • Design instructional management systems. (Advanced) • Provide for the effective implementation of instructional products and programs. (Essential)

The IBSTPI competencies are most extensively researched and validated instructional design competencies (Larson & Lockee, 2009).

Three Levels of Core Competencies

Tennyson (2001) developed a model to identify core competencies for instructional technologists (IT) in a technology-based environment. An instructional

technologist was referred to “a person who is employing the ID process to solve learning and performance problems and needs in a technology environment; for example, Web-based instruction” (Tennyson, 2001, p. 356). Such technologist can be a novice, apprentice, or expert, depending on the knowledge and skills in educational foundations, ISD methodology, and ID experience. By his definition, a novice has no prior core knowledge or skills in either area; an apprentice has educational foundations and limited ISD methodology, which can be acquired in formal education; an expert has strong core knowledge in all three areas (Tennyson, 2001). In other words, what differentiates an expert from the rest is the experience in instructional development process. Agreeing with other researchers, Tennyson believed experts are competent in problem identification and problem-solving (Kirschner, van Vilsteren, Hummel, & Wigman, 1997), and they spent more time in analyzing problems and needs before working on the solutions (Tennyson, 2001). Their thoughtful process and creativity of solving problems are the results of years of experience in applying the above mentioned core knowledge and skills. The minimum number of years of experience to reach the expert status was estimated to be five, regardless of fields and disciplines (Perez & Neiderman, 1992; Tennyson, 2001). Specific to instructional technologists in the field such as Web-based instruction, such experiences include problem-solving and solution planning, bridging between theories and practical implications, and planning and management, according to Tennyson (2001).

The five qualities an expert instructional technologist has relative to novices and apprentices are (Tennyson, 2001, p. 258):

- Possesses more foundational knowledge in learning philosophy, learning theory, and instructional theory.
- Better hierarchical organization of and access to ISD methodological knowledge.
- Spends more time analyzing given learning problem(s)/need(s).
- More easily recognizes problem(s)/need(s) solution patterns and alternatives.
- Understands learning problem(s)/need(s) at a more complex level.
- Monitors more careful, skillful and thoughtful solutions and development performances.

Tennyson (2001) admitted that the more complex a learning need is, the more possible alternative solutions there will be, and therefore the more years of experience are required. Additionally, maintaining the expert level is a “lifetime effort devoted to maintaining contemporary knowledge in both competency areas” (p. 359) – that is, educational foundations and methodology areas.

An ID core competency worksheet was presented for self-evaluation. There are three steps in which a score from one to three is assigned when a statement has been met. In the end, an expert should be identified to have the highest score, that is nine; an apprentice has a score ranging from five to eight; a novice has a score of three or four (Tennyson, 2001).

In summary, Tennyson’s model has three levels, three competency areas, and three steps. Instructional technologists must have enough years of experience in ID process, in addition to strong knowledge in learning philosophy, learning theory, and instructional theory, “to assume the title of IT expert” (Tennyson, 2001, p. 360).

Context Differences for Instructional Design

To link between learning context and real-world context, Hansen (2010) piloted a study using job postings attempting to analyze the industry context. The rationale was “different contexts impose distinctly different practice” (Jonassen, 2000, p. 116).

Context in this study has been defined broadly as a body of factors where learning and performance occurs (Hansen, 2010). Hansen (2010) submitted to the idea that universities should develop context-oriented curricula to better prepare their graduates for the job market, so that they can “perform to a standard set of industry defined competencies” (p. 51). Current competency models typically cover the entire occupations, describing minimum competencies and non-specific performance outcomes without contextual information, according to Hansen (2010). Such competencies are consequently “insufficient” (Hansen, 2010, p. 54), “one-size-fits-all” (p. 66), and “difficult for learners to understand and apply” (p. 53).

To capture the context where instructional design is practiced, Hansen examined and coded 178 Internet job postings related with instructional design positions, with the automated analysis accomplished by software CAQDAS. The codes were then connected and four themes were identified: Direct contextual definition, environmental description, activity description, and personal characteristics (Hansen, 2010).

The direct contextual definition includes:

1. Title;
2. Alternate title;
3. Industry context;
4. Subject matter & sub-subject matter; and

5. Location.

The second theme environmental description includes:

- Company goals;
- Company policies;
- Physical context;
- Social context;
- Organizational hierarchy;
- External relationships;
- Internal relationship;
- Production interfaces;
- Company culture; and
- Communications.

The third theme activity description includes:

- Task;
- Tools;
- Production process;
- Production assessment;
- Product;
- Product assessment
- Standards; and
- Return on investment.

Lastly, the fourth theme personal characteristics include:

- Knowledge;

- Skills;
- Attitude;
- Education;
- Experience;
- Accountability;
- Motivation; and
- Coping strategy.

The contextual model created in this study “characterizes context but, more importantly, provides a basis for comprehending context and the design of instruction” (Hansen, 2010, p. 159).

This study also discovered trends in instructional design industry. Of all job postings analyzed, 77.46% products required to be produced were eLearning. The trend towards eLearning was supported by the observation of strong requirements of technical skills, especially computer skills followed by a long list of tools (Hansen, 2010). Hansen (2010) further noticed “more concentration on development tasks and a noticeable lack of emphasis for analysis and evaluation of learning” (p.160). On the other hand, the interest in specific domain knowledge has been increased significantly (Hansen, 2010), appropriated by a list of two-and-half-page long domain knowledge requirements. Some non-traditional instructional designer roles have been identified as well, such as Website development, facilitation and instructing, event hosting (Hansen, 2010). Overall, instructional design environments are fast-changing environments full of variables.

Job postings provide an abundant and unbiased source of information; they are nevertheless not sufficient to describe the context of instructional design environments.

Dissertations on ID Competencies

Competencies proposed by various professional organizations are not the only source of attempting to analyze competencies for expert instructional designers. Several doctoral studies have identified the competencies and performance behaviors for ID in general as well as for specific instructional environments, including Web-based instruction (Larson, 2004).

The first doctoral study to be reviewed is Atchison's (1996) dissertation. Atchison's study examined not what expert instructional designers should do but what they were doing and must do in practice (Anderson, 2000). His qualitative descriptive study was a response to Rowland's call of expanding research on what the instructional designers actually do (Atchison, 1996). The study was conducted with 15 subjects employed in four different settings with various professional experiences. It employed a critical incident survey, and followed with an audiotaped interview. As the result, nine role themes were identified. Each was described by a competency statement and sets of performance statements (Atchison, 1996). The nine role themes are mostly conceptual, as opposed to procedural steps or tasks prescribed in instructional design models (Atchison, 1996). The themes are reflector, ethicist, humanist, collaborator, advocate, evaluator, manager, marketer, and entrepreneur. All themes but one were "found most on human related issues" (Atchison, 1996, p. 58). In other words, Atchison (1996) believed these sets of knowledge, intuition (drawn from experience), and skills can be learned and refined. However, they cannot be learned from books and lectures, but rather "on the job, with real cases" (Atchison, 1996, p. 11). Atchison's argument is that "Experts have no

fixed way of operating because they are guided by the context they are in ...” (Atchison, 1996, p. 11). He used this rationale to justify his qualitative and conceptual approach.

One of the limitations of the study is that the “selection of experts [was] based on professional organization membership rather than through evaluation of expert status” (Larson, 2004, p. 49). Atchison competency list for expert instructional designers was used by IBSTPI to “form the first base list of revised competencies” from its 1986’s competency edition (Richey, Fields & Foxon, 2001, p. 144).

The second study to be reviewed is Simon’s (2003) dissertation. Simon’s study evaluated roles, output, and/or competencies of university faculty in the Web-based arena (Simon, 2003). This study was to answer the challenges of instructors who assumed the burden of teaching fully online. Based on Thach’s (1994) competency model of distance education, Simon conducted a two-round survey to a group of self-assessed experts, who satisfied three criteria: working for academic institutions, teaching or serving in an administrative role or researching in WBI, and having at least three years’ experience. This modified Delphi study, using two rounds of online survey yielded the result five roles, 32 outputs, and 27 competencies.

The five revealed roles, in the order of importance, are content expert, instructional designer, technologist, process facilitator, and manager. The key competencies in Web-based instruction listed and ranked by participants “corresponded with the literature” (Simon, 2003, p. 115), they are: communication skills, collaboration skills, group process skills, software knowledge, organizational skills, basic technology knowledge, content expertise, and facilitation skills.

Enlightened by the studies in the field of distance education in general, Simon didn't find "comprehensive research-based study on WBI competencies" (Simon, 2003, p. 68). Her study provided a descriptive model to "better understand, use, and benefit from online education" (Simon, 2003, p. 16). One finding of the study is that hands-on/constructivist and collaboration/teamwork were regarded by the experts to be the most effective ways of training and developing WBI competencies. Seminars and workshops were the least effective (Simon, 2003).

The third doctoral study to be reviewed is Larson (2004). The purpose of her study was to "identify how, and how well, IDT programs are preparing students for professional practice in different career environments" (Larson, 2004, p. 2). She conducted extensive literature review on competency standards and professional practices for the four instructional design technology (IDT) career environments. They are business and industry, higher education, K-12 education, and government/military. A summary of 12 competency studies by career environments is listed in Appendix A.

The procedure of Larson's study involved the use of a mixed methods approach: A quantitative survey followed by a qualitative case study. In phase I, a four-point Likert scaled survey was distributed by mail and online. The mail survey participants were from "systematically-selected sample of practitioners from three special-interest divisions of the Association for Educational Communications and Technology (AECT)" (Larson, 2004, p. 91). More specifically, the survey was mailed to 254 system-selected members in AECT's mailing list of its Instructional Design and Development Division, the Training and Performance Division, and the Distance Learning Division. The online survey was advertised and made available to all professionals in IDT with membership

within AECT, ISPI, and ASTD. No participants were expected to respond to both surveys. The results of the survey analyses were used to describe a big picture on the match between the participants' career preparation programs and their IDT work experience. The results also played a determinative factor in selecting exemplary programs for phase II case study. Phase II case study included semi-structured personal and telephone interviews with IDT educators, focus group with current students in the Instructional System program of Florida State University, and an analysis of program documents.

The findings of the research include:

- The majority of respondents felt somewhat prepared to fully prepared for general instructional design competencies, ID models, learning theories, and flexible design utilizing such models and theories.
- Slightly larger percentage of respondents felt they had minimal or no preparation for environment specific competencies, subject matter specific to their job roles.
- Forty percent or more survey respondents indicated they had issues at workplace cultural aspects when they first entered instructional design practice (Larson, 2005).

While it was not the intent of Larson's study to identify instructional design competencies specific to career environments, she agreed with the literature that it is essential to prepare "IDT students for a variety of career environments" (Larson, 2004, p.202). The recommendation derived from the case study is to prepare students with a

generalist approach, rather than career environment specific approach, with situated methods and cognitive apprenticeship (Larson, 2004).

The fourth doctoral study to be reviewed here is Thach (1994). The purpose of her study is to identify the roles, outputs and competencies of distance learning professionals within the United States and Canada. The study was accomplished by eliciting perceptions from experts in distance education. She borrowed the McLagan (McLagan, 1983; McLagan & Suhadolnik, 1989) process model for roles, outputs and competencies in her study.

The study was conducted with two rounds of mail surveys, which were distributed to members of ASTD. The chosen population met the criteria of teaching or serving in the distance education field in an academic institution for at least one year. Round one survey was open-ended. It provided lists of roles, outputs and competencies drawn from literature as reference to respondents. Eleven roles, 83 outputs, and 51 competencies were derived. Round two survey was the compiled inclusive list from round one survey, in an close-ended format. It was sent to the same respondents of round one survey. As a result, the top four roles were identified as administrator, instructor, technology experts, and instructional designer. The top ten competencies for the instructional designer's role were: (1) collaboration/teamwork, instructional design, ID for interactive technology; (2) media attribute knowledge; (3) knowledge of distance learning field; (4) teaching strategies; (5) evaluation; (6) group process; (7) writing; (8) support services knowledge; (9) needs assessment skills, learning styles and theory; and (10) presentation and training (Thach, 1994).

It is worth noting that the competencies were purposed for distance education professionals who are “teaching or working in an administrative/support roles in the field of distance education. This can be either a university or industry/business setting” (Thach, 1994, p.4). However, the population of this study came from the academic setting only, meaning universities and colleges.

Summary

This section began with a review of the IBSTPI competency study with a brief description of its three editions of competencies evolved over time. Successively was Tennyson’s three level of core competency study for self-assessing the level of expertise for instructional technologist in a technology-based environment. Next was Hansen’s extensive study to analyze industry context differences for instructional design using Internet job postings. It was then followed by examining four doctoral studies, with topics varying from competencies for ID experts to competencies perceived by distance education experts. The purpose of the reviews was to find support on identifying competencies especially for experts in WBI from previous studies. The review of the related literature revealed that a practitioner in instructional design can play many roles. The required knowledge and skills can therefore be grouped into several competency domains specific to their roles. It was agreed that competencies are context- or career-specific. They can be acquired on the job over years of experience.

CHAPTER 3 METHODOLOGY

This section describes how this study was conducted. The first part discusses the participants in the study, followed by the research design and instruments used for data collection. A description of the pilot study is presented for the instrument testing. Lastly is the report of the step-by-step procedures and general account of data analysis showing how the study was accomplished.

Participants

The objective of this study was to identify the competencies of expert instructional designers working in WBI. Consistent with this objective, the 15 interview participants of the study served as the expert panel since they were experts in the field of instructional design and development specialized in WBI. The second group of participants, or the survey participants, rated the competencies extracted from the expert panel inputs.

Given the nature of qualitative research design, the sample selection for the interview group was non-random, purposeful, and small (Merriam, 2009). Quota sampling technique was used. There were five criteria for the interview population:

1. Having at least ten years of work experience in instructional design, including five years specialized in WBI.
2. Participated in WBI projects as a leading instructional designer for at least three years.
3. The WBI projects they participated in those three years must be fully Web-delivered courses.

4. Working in the WBI field during the time of participating in this research.
5. Earned at least a Bachelor's degree in Education, Instructional Design /Instructional Technology, Training and Development, or a related field. A Master's degree in those fields was preferred.

The criteria for the survey population were:

1. Involvement in instructional design for Web-based instruction before or during participating in this research.
2. Business operation or employment based in U.S.A..
3. Never participated in the interviews.

The individuals meeting the above criteria were identified from two sources. The first source was professional recommendation by peers, alumni, faculty and managers in the WBI. The second source was members from professional organizations: the American Society for Training & Development (ASTD), the International Society for Performance Improvement (ISPI), and other professional groups at LinkedIn. These organizations have been chosen because (1) they have a large membership in the fields related to this study, and (2) there was convenient access to the members. ASTD is dedicated to workplace learning and performance professionals. Its members work in thousands of organizations of all sizes in various settings, as independent consultants or employed individuals. The researcher was an active member of both ASTD and its local chapter Greater Detroit ASTD (GDASTD), which enabled direct access to other members. The search for interview participants continued until 15 participants were identified. One additional participant was added later because a prior participant was dis-qualified during the interview process. The recruitment of 30 survey participants took place simultaneously

with the survey launch – the survey link was provided in soliciting emails and LinkedIn group discussion postings. In other words, the survey was open to everybody, requiring no invitation. The criteria, however, were presented in the emails and postings, and further validated in the survey with mandatory questions. The survey stayed open until 31 complete responses were received because one participant's response was excluded as a result of a self-reported error.

The participants of the study were divided into two groups – the first group included 15 participants for interview, and the second group included another 30 participants for survey. The first 16 participants (one was excluded later) contacted who agreed to be interviewed were in the first group, the rest fell under the second group. Participants recruited through open LinkedIn postings filled the gap of by personal recruitment.

Research Design

The data collection of this study had two phases: Interviews and an online survey. The interviews were conducted by Web, telephone, or face-to-face meetings. Interviews utilized open-ended questions, while the survey collected both open-ended responses and numeric rating data. Mixed methods were therefore utilized.

The main purpose of the interviews was to collect sufficient data to compose the list of competencies categorized in knowledge, skills and attitudes featuring expert designers in WBI. The online survey was intended to determine the relative importance of each competency item in the entire list.

The interviews employed the critical incident technique; the participants were asked to reflect upon the process, tasks and skills they used in one WBI project that

rewarded them with either personal pride or external recognition. This technique allowed best representation of the full process of instructional design.

Instrumentation

The interview instrument included 19 questions that were open-ended and structured to answer the first three research questions and research questions five and six. The first three research questions focus on discovering the domains in which the expert Web-based instruction designers work, and the competencies qualifying them as experts (See Appendix B for a copy of this instrument). Information addressing research questions five and six on the environment impact on competencies and perception of the future was also collected in the interview instrument. The interviews were digitally recorded and transcribed.

In the second phase, an online survey was implemented. The survey link was enclosed in emails and forwarded to the second group of participants. The link was also provided in the postings at nine LinkedIn professional groups. The survey was designed such that the answer to research question four would be drawn. The participants of the survey were asked to:

1. Provide demographic information.
2. Rate the importance of each competency on a Likert scale.
3. Provide any additional information or suggestions.

Pilot Study

Two separate pilots were conducted.

The first pilot was to test the interviews. Two participants were contacted individually to schedule an interview. The first pilot interview was a face-to-face

interview, the second was a remote interview. WebEx was chosen for this remote interview. The Research Informed Consent form and interview questions were emailed a few days before the scheduled date. A separate email with the meeting instructions was sent from WebEx to the remote participant directly. The duration of the interview was projected to be one hour. The conversations were recorded. Attention was given to how well the questions and answers flow, the understanding of terms, the appropriateness of the chosen platform, the functioning of recording, and timing. After the pilot with the first pilot interview participant, it was noticed that:

- The criteria to participate in the interview were not clear to the participant.
- The participant answered only part of a question if that question had multiple parts.
- There was no opportunity for the participant to give other opinions.
- The duration was shorter than estimated.
- The participant was nervous.

Modifications were therefore made accordingly, such as adding criteria validating questions, adding a catch-all question as Question 14, breaking questions down so that no question had any subordinate questions, revising words and the order of the interview questions. After the revision, a second participant was interviewed. The second pilot interview was conducted with the revised questions and on a different platform. It demonstrated that the participant was very comfortable with Web interview. Also, the initial instructions from WebEx were sufficient; therefore no additional instructions were given. No issue stood out other than the duration was still much shorter than estimated. A demographic question was therefore added; another catch-all question was added at the

end of the interview. The pilot interviews were transcribed and analyzed partially for potential categories of skills. The process of pilot transcription and analysis attempt allowed a better understanding of what the interviews should focus on, which was the knowledge, skills, and attitude used or deemed necessary by the participants. Where and how the participants brought up such key content mattered little. This finding suggested the researcher pay closer attention to the actual content and call for immediate clarification when necessary.

Similarly, the online survey was pre-tested by three participants. They each were informed of the objectives of the study and the pilot survey link. In particular, they were asked to note the time spent on the survey, anything ambiguous or confusing, or any technical issues. Their feedback, other than the answers to the survey questions, was recorded. They also sent feedback to the researcher in emails. The three pilot survey participants reported no technical issues. The duration was 5 minutes and 13 minutes, respectively. The third pilot survey participant forgot to track timing. They suggested language revision, such as spelling out acronyms, clarifying researcher's two names, and correcting grammatical mistakes. Minor revisions were therefore made.

The five participants in the pilot study were not included again as participants of the remaining study. Their responses were therefore included neither in data collection nor analysis.

Data Collection

The procedures for data collection are summarized below:

1. *Interview confirmation and scheduling.* The participants were confirmed in advance by phone calls or email about their participation. Each individual was

scheduled a convenient time to be interviewed. The interview took place mostly during lunch breaks or evenings, rarely weekends and holidays.

2. *Convenient location.* Most interview participants preferred a Web or phone interview. When a face-to-face interview was desired by either a participant or the researcher, a location was chosen by the participant or proposed by the researcher. It was anywhere near the participant' home, workplace, or anywhere in the commuting route of his/her home and workplace. The interview took place in a room without distraction or interruptions.
3. *Delivery platform.* The interviews were delivered by World Wide Web, teleconference service, or a direct face-to-face meeting. Out-of-state participants were interviewed remotely by Web or teleconference. For participants living within the driving distance from the researcher, they either chose their preferred platform or let the researcher decide.
4. *Preparation communication.* Instructions on the interview and a list of structured interview questions were sent in advance via email to the interview participants, together with the Research Informed Consent form (see Appendix D). The participants were instructed on how to access the interview Website or teleconference service, if applicable. Usually the interview started with Question 1, unless there was a special need to begin in a different order. The participants were told to return in email the signed Research Informed Consent form before the interviews.
5. *Structured interview.* The critical incident technique was used - the participants were asked to identify one of their most satisfied projects to

discuss the competencies for expert instructional designers in WBI. All participants were asked the same pre-designed questions. It was possible that additional clarifying questions were asked, or casual comments were made to certain individuals. The interview questions were provided in advance for participants to contemplate.

6. *Audio recording.* The interviews were digitally recorded for later transcription. Minimal notes were taken during the interviews.
7. *Duration.* The interview was estimated to run for about one hour. This was modified by changing interview techniques from the pilot study. The interviews ranged from one hour and ten minutes to two hours and forty minutes. An additional interview was added to replace a disqualified participant. The time to complete all 16 interviews was approximately six weeks.
8. *Courtesy.* A thank-you email was sent to each interview participant after the interview. The Research Informed Consent form bearing the researcher's signature was scanned and attached in the email for the participant's record. Reminder emails were sent to those participants who did not return the signed Research Informed Consent forms. Participants were also promised to receive research results upon completion of study.
9. *Online survey.* The second group of participants, or the survey participants, received an email containing the online survey (see Appendix J) link and a deadline. The online survey link was also posted on several professional group Websites or discussion forums. The Research Informed Consent form for the

survey (see Appendix E) was embedded in the survey body. To begin the survey, the participants had to click a button to indicate their consent. The participants were not required to answer all questions, except for the first few policy and filtering questions. However, only responses from those who completed all questions were included for analysis. The survey was set up to close automatically as soon as 30 complete responses were reached. One more complete response was later included because a participant indicated in the feedback field that his/her rating on the 20 competencies was accidentally reversed. The response from this participant was thus excluded from the study.

Data Analysis

The second phase of the study, which was a survey, was based on the results from phase one. In other words, the data analysis started before the full completion of data collection. Once the interview phase ended, the interview recordings were transcribed for interpretation. Keywords, coding and other techniques were employed to efficiently generate an expected list of performance statements. The identified performance statements were further grouped into competencies categorized under the domains. This list of competencies became the base of phase two the online survey. Once phase two was completed, survey results were calculated quantitatively. The average rating of importance of each listed competency was identified. Any confidential information was removed from the audio transcriptions.

The timeline for the data collection and analysis for the study is presented in Table 2.

Table 2
Timeline for Data Collection and Analysis

Time	Focus	Methods
09/30/2011 – 11/17/2011	<ul style="list-style-type: none"> ▪ Obtained HIC expedited approval ▪ Networked 	<ul style="list-style-type: none"> ▪ Attended chapter meetings ▪ Joined professional organizations ▪ Set up LinkedIn account
11/17/2011 – 12/18/2011	<ul style="list-style-type: none"> ▪ Recruited participants ▪ Conducted the two pilot interviews ▪ Transcribed pilot interviews ▪ Analyzed pilot interviews ▪ Modified interview questions ▪ Scheduled more interviews 	<ul style="list-style-type: none"> ▪ Emails ▪ Phone calls ▪ LinkedIn connections and contacts ▪ Interviews ▪ Notes ▪ Audio recordings ▪ Transcribing tools and software
12/19/2011 – 01/24/2012	<ul style="list-style-type: none"> ▪ Continued the recruiting process ▪ Conducted 16 interviews ▪ Transcribed a few interviews 	<ul style="list-style-type: none"> ▪ Emails ▪ Phone calls ▪ LinkedIn connections and contacts ▪ Interviews ▪ Audio recordings ▪ Transcribing tools and software
01/25/2012 – 02/04/2012	<ul style="list-style-type: none"> ▪ Transcribed the remaining interviews 	<ul style="list-style-type: none"> ▪ Transcribing tools and software
02/05/2012 – 02/18/2012	<ul style="list-style-type: none"> ▪ Analyzed transcriptions with keywords & codes ▪ Tabulated interview data ▪ Created performance statements ▪ Created competency list 	<ul style="list-style-type: none"> ▪ Excel spreadsheet ▪ Word document
02/19/2012 – 02/25/2012	<ul style="list-style-type: none"> ▪ Recruited pilot survey participants ▪ Launched the pilot survey ▪ Revised the survey 	<ul style="list-style-type: none"> ▪ Emails ▪ Zoomerang survey
02/27/2012 – 03/02/2012	<ul style="list-style-type: none"> ▪ Launched the survey 	<ul style="list-style-type: none"> ▪ Zoomerang survey ▪ Emails ▪ LinkedIn connections and contacts ▪ LinkedIn group discussion sites
03/02/2012 – 03/20/2012	<ul style="list-style-type: none"> ▪ Analyzed data ▪ Wrote Chapters 3 and 4. 	<ul style="list-style-type: none"> ▪ SPSS ▪ Excel spreadsheets

CHAPTER 4 RESULTS AND FINDINGS

This chapter presents findings from the analysis of the data collected from 45 participants. The primary objective of this study is to discover the domains of expertise, the competencies, and the performance statements of the competencies to perform at the expert level for the role of instructional designers in WBI. Twenty competencies with 91 supporting performance statements grouped under four identified domains are presented to fulfill this objective. The secondary objective is to decide how important each competency is relative to the other competencies. A ranked competency list is provided. The third objective is to understand if work environments had any effects on the expert performance. A cross-referenced table realizes this objective. The fourth objective is to understand the future of Web-based instruction and its impact on instructional designers. An accumulated descriptive list fulfills the last objective.

Description of the Sample

Demographics

There were two groups of participants. One serving as the expert panel was the interview group; another was the survey group. The second group doubled in size compared to the first group. Table 3 describes the general demographic information of the first group. Table 4 portrays the general demographic information of the second group.

Table 3
 Characteristics of Participants in the Interview Group
 (N=15)

Gender	Age Range	Business Nature	Education	Business Size
Female 60%	25-35 0%	Business/Industry 73.30%	Bachelor's 6.70%	<100 13.40%
Male 40%	36-45 53%	Education 6.70%	Master's 66.70%	101-500 13.30%
	46-55 20%	Government/Military 6.70%	Doctorate 26.70%	501-1,000 13.30%
	>56 27%	Healthcare 6.70%	N/A 0.00%	1,001-2,500 6.70%
		Independent 6.70%		2,501-10,000 20%
		Other 0%		>10,000 33.3%

Table 4
 Characteristics of Participants in the Survey Group
 (N=30)

Gender	Age Range	Business Nature	Education	Business Size
Female 60%	25-35 13%	Business/Industry 40%	Bachelor's 27%	<100 10%
Male 40%	36-45 30%	Education 10%	Master's 53%	101-500 10%
	46-55 40%	Government/Military 17%	Doctorate 13%	501-1,000 13%
	>56 17%	Healthcare 20%	N/A 7%	1,001-2,500 7%
		Independent 3%		2,501-10,000 17%
		Other 10%		>10,000 43%

Table 3 shows that there were more female expert instructional designers working in WBI than males. More than half of the expert instructional designers in WBI were between age 36 and 45, and approximately a third were at age 56 and above. It is safe to

conclude that the experts were middle-aged. Over 70 percent of them were employed in the business or industry sector. Thirty three percent were from organizations with over 10,000 employees, 20 percent were from organizations sizing between 2,501 and 10,000 employees. Ninety three percent of them had a Master's degree or above.

Table 4 displays that there were more female instructional designers working in WBI than males. Thirty percent of the instructional designers in WBI were in the age range between 36 and 45, and another 40 percent were between 46 and 55. In other words, the majority of them were middle-aged. They clustered in the business or industry sector, followed by healthcare. Forty three percent were from organizations at the size larger than 10,000 employees, 17 percent were from organizations at the size between 2,501 and 10,000 employees. More than half of them earned a Master's degree.

As mentioned in the previous chapter, the participants in the interview group met the criteria of expert instructional designers in WBI defined in this study, while the participants in the survey group didn't have to. The two criteria for the survey participants are being an instructional designer involved in WBI and they were not in the interview group. As a result, survey participants may or may not be expert instructional designers themselves in WBI, while the interview group is a validated expert group. The demographic data in Table 3 and Table 4 present differences in that:

- Nobody in the interview group was in the age range between 25 and 35.
- The interview group had a higher percentage of instructional designers in WBI at age 56 or above than the survey group did.

- The individuals in the interview group gathered more in the business or industry sector, while the survey group had a more diverse spread across different sectors of business.
- The interview group had a higher percentage of instructional designers in WBI earned a Master's degree as their latest degree, while the survey group had more instructional designers in WBI earned a Bachelor's degree as their latest degree. Furthermore, the interview group had a higher percentage of instructional designers in WBI earning a doctorate degree than the survey group did.

In brief, the findings from these two tables suggest that expert instructional designers in WBI tend to be older, had higher education, more likely working in the business or industry sector than non-experts.

Professional Experience

Another set of information about the participants was their professional experience: the job titles and the years of experience in WBI as instructional designers. Table 5 and Table 6 list the most recent job titles for the two groups at the time of research. One participant in the interview group did not have a job title. "I don't have any, I work for a company where we do not do those." (Transcription for Interview 007, line 4).

Table 5
Job Titles of Participants in the Interview Group
(N=15)

No.	Job Title
1	Principal Instructional Designer
2	Lead Instructional Designer
3	Manager of Instructional Development
4	Instructional Designer (Independent)
5	Instructional Designer
6	Principal Training and Development Specialist
7	(NA)
8	Senior Instructional Designer
9	Instructional Designer and Technical Writer
10	Leadership of Professional Development
11	Assistant Professor
12	Knowledge Management Leader
13	Senior Instructional Design Consultant
14	Learning Developer
15	Program Director

Table 6
Job Titles of Participants in the Survey Group
(N=30)

No.	Job Title
1	Workforce Programs Specialist
2	Senior Trainer
3	Training Manager
4	Training Specialist
5	Manager, Talent Development
6	Instructional Technology Performance Catalyst
7	Training Coordinator
8	Training Instructor
9	Senior Learning & Development Consultant
10	Senior Instructional Designer
11	CEO and Learning & Development Leader
12	Senior Instructional Designer
13	Freelance Instructional Designer
14	Senior Instructional Design Consultant
15	Senior Instructional Designer
16	Learning Manager
17	Training Specialist

18	Instructional Designer
19	Manager, Instructional Design - contract
20	Instructional Designer
21	Instructional Designer
22	Instructional Systems Design Specialist
23	Instructional Designer
24	Instructional Designer
25	eLearning Consultant / Higher Ed Faculty
26	Senior Instructional Designer
27	Senior Analyst and Developer
28	Senior Instructional Technologist
29	Senior Instructional Designer
30	Learning Manager

The variety of the job titles suggests that instructional designers, whether they are experts or non-experts, functioned in different positions. Another interpretation for the job title variation is that organizations didn't label the instructional designers in the same way, or simply "do not have a formal job title of 'instructional designer'" (Richey, Fields & Foxon, 2001, p. 36). However, some organizations did give their instructional design professional a job title which indicated a senior or leading level, for example "principal", "lead", "manager", "senior", "leadership", "leader", and "director". In the interview group, nine out of 15 participants, which is at 60%, carried those job titles indicative of seniority. In the survey group, 14 out of 30 carried such job titles, which is 47%. It was possible that some survey participants were no longer doing instructional design in WBI at the time of survey. Their job titles consequently did not reflect any aspects of instructional design.

Table 7 describes the years of work experience in the WBI field as an instructional designer for both interview and survey groups. Because the survey group participants were not required to be experts, the number of years worked as lead instructional designers in WBI was not collected for the survey group.

Table 7
Years Worked in Web-based instruction as an Instructional Designer

No.	Years in WBI (Interview Participants)	Years as Lead (Interview Participants)	Years in WBI (Survey Participants)
1.	11	6	3
2.	15	15	2
3.	15	11	22
4.	10	3	10
5.	6	4.5	12
6.	11	9	10
7.	12	4	10
8.	16	8	10
9.	12	4	8
10.	14	14	7
11.	10	10	8
12.	8	8	3
13.	10	10	5
14.	8	8	15
15.	7	4	11
16.			5
17.			3
18.			3
19.			10
20.			13
21.			10
22.			15
23.			10
24.			2
25.			7
26.			10
27.			5
28.			12
29.			15
30.			14
Average:	11	7.9	9

Although Kidd (2010) described 1990 to 1995 as the era of Web Based Training, “it was not until about 2001 that advances in learning technologies really began to take off, as did the utilization of eLearning by corporations.” (Comstock, 2010, p.10). In Comstock’s (2010) thesis, the term Web-based training/instruction and eLearning were identical. Considering this timeline as Web-based training being widely adopted by companies, we can regard instructional designers with over 10 year experience in WBI were forerunners in the field.

Educational Background

The third set of information about the participants was their educational background: highest degree and majors they last graduated with. The former has been discussed in the first section “Participant demographics”; this section focuses on what the participants have studied in school. Table 8 lists the majors of the interview group participants and the survey group participants.

Table 8
Majors of the Last Degrees by Participants

Major of the Last Degree (Interview Group Participant)	Major of the Last Degree (Survey Group Participant)
Industrial Organizational Psychology	Instructional Technology
Art	Medical Laboratory Science
English Literature	English/Education
Education and Instructional Technology	History
Training and Development	Instructional Design
Instructional Technology	Communication
Human Resources Development	Elementary Education

Educational Technology

Instructional Design & Technology

(NA)

Training and Development

Business Administration

Performance Improvement & Training

Performance Improvement &

Instructional Design

Human Resources

Educational Technology

Education

Instructional Systems

Instructional Design for Online

Learning

Instructional Systems Development

Information Systems

Table 8 shows that one survey participant did not have a four-year college degree. One of Richey, Fields & Foxon's (2001) assumptions is that instructional designer should be able to demonstrate their competencies regardless of their training. Nevertheless, having an academic degree is a strong credential for having completed a formal training. It is evident in Table 8 that a formal training in the related field is desired by the majority of the employers and therefore by employees -- an overwhelming percentage of participants earned degrees in the majors closely related to instructional design.

The two lists do not include other majors the participants studied in the previous degree programs. It would be interesting to track how professionals became attracted to instructional design profession by looking at their records of academic pursuit. It is, however, beyond the scope of this research.

This section investigated the general characteristics of the sample population: gender and age distribution, the types of business they work for, and their educational levels. Their educational backgrounds were further examined by looking at the majors of their latest degrees. Participants' professional experiences were also studied. As Shanteau (1992) pointed out, "Having an adequate grasp of domain knowledge is obviously a prerequisite for being an expert" (p. 256). Domain knowledge comes from textbook knowledge about facts and theories, insights gained from related experience, and case based reasoning (Shanteau, 1992). However, Shanteau (1992) admitted it is not sufficient for experts. The next section focuses on the skills and competencies from the performance perspective.

Performance, Competencies, and Domains

In order to identify the domains, competencies, and performance statements of the expert instructional designers in WBI, the research started with identifying performance statements by interviewing a group of experts in depth. Competencies were later identified by merging the performance statements into groups. The domains were done in the similar manner.

Fifteen separate interviews were scheduled for 15 participants. The 15 individual participants were either self-selected after reading the research advertisements at the Great Detroit ASTD and ISPI National websites, or volunteered after being approached

by emails. The website advertisements and the emails clearly listed the five criteria to participate in the research. Such emails were sent to those who were considered potential candidates by screening through their available LinkedIn profiles. The potential candidates checked their background against the five criteria. Consent was communicated thereafter. Their participation qualification was validated again in the interviews. The first ten questions in the interview were designed to collect demographic data and to validate the qualification. It was noticed during an interview that one participant didn't meet the five criteria. The interview was completed nevertheless; a 16th participant had to be scheduled. All interviews were completed in one session, except for one interview where the participant had to leave to finish a project that day, so a second interview was scheduled. There were five face-to-face interviews, eight WebEx interviews, and two phone interviews. The five face-to-face interviews took place in various public libraries. Room reservations were made accordance with the libraries. The researcher arrived at the libraries earlier to do a field check, when the advance reservation was not allowed. Free trial subscription to WebEx was used initially, and later became upgraded to one month paid service. Of the two phone interviews upon the participants requests, one was conducted using a regular residential phone line, another was conducted using a teleconference service. A high end hands-free phone set optimal for audio conference was used in both phone interviews. Minimum technical issues occurred during interviewing: A loss of Web connection within a firewall and low audio quality in WebEx. They were resolved by utilizing the audio conference feature of WebEx. Another technical issue was that the memory ran out in the digital recorder during a face-to-face

interview. The researcher had to rely on note taking for the last three questions, and later went back to the participant for addition and revision.

All 16 interviews were digitally recorded with Olympus LS-7 in PCM wave format. Additionally, the eight WebEx interviews were also recorded using WebEx recording function and Express Scribe dock function. The WebEx recordings were transferred to the researcher's hard drive and deleted from the WebEx server before discontinuing the paid service. The qualified 15 interviews were transcribed to text with several tools: Microsoft Media Player, Express Scribe, Naturally Dragon Speaking Platinum 10. The disqualified interview participant was not transcribed and therefore not included in data analysis. The total number of the pages for the transcriptions of the 15 interviews is 211. Each of the 15 transcriptions was fully marked with line numbers at the left (see Appendix F). By reading 211 pages, 91 performance statements were generated progressively and documented in Word, each given a numeric code. Those codes were marked on the left or right margin of the transcriptions whenever a matching performance was identified, together with a pair of parentheses to indicate the beginning and ending of the performance within the paragraph. The performance statement list expanded sometimes with the progress of reading new transcription. It was therefore necessary to go back to read previous transcriptions again. As soon as reading and coding transcriptions were done, the line numbers were entered into an Excel spreadsheet (see Appendix G). The Excel spreadsheet had 91 performance statements and their representing codes in the left columns, and 15 participants' unique identification numbers from 001 to 016 in the top row. Each occurrence of a performance in the transcriptions was entered into the Excel Spreadsheet with a corresponding line number or numbers. By

the end of the data entry, the occurrences of 91 performance statements were summed up separately for each participant. The rest of the data analysis was based on this processed data.

Appendix L lists the 91 performance statements by the order they were identified in the transcribing process.

The identified performance statements were merged into categories of skills or attitudes. The new categories of skills or attitudes became the competencies. For example, performance statements 23, 26, 28, 61, 69, 73, 74, and 78 were merged into one competency “Communicate effectively, in visual, oral, and written formats”:

- 23. Write and edit text clearly, correctly and appropriately for the target audience.
- 26. Communicate clearly and effectively in a language understood by developers.
- 28. Ask the right questions to extract information from SMEs and stakeholders.
- 61. Apply message design principles for screen design.
- 69. Listen well to understand and translate information for instruction.
- 73. Negotiate with customers, vendors or stakeholders to manage expectations, goals, and resources.
- 74. Present in meetings.
- 78. Sell ideas, proposals, or expertise to the management.

As the result, 20 competencies were identified. The four domains in the IBSTPI model were appropriate and applied for the identified competencies of this study. The complete list of domains, competencies, and supporting performance statements were given in Table 9 below.

Table 9
Domains, Competencies, Performance Statements for Expert Instructional Designers in WBI

Professional Foundations

1. Communicate effectively, in visual, oral, and written formats.

- Write and edit text clearly, correctly and appropriately for the target audience.
- Communicate clearly and effectively in a language understood by developers.

- Ask the right questions to extract information from SMEs and stakeholders.
 - Apply message design principles for screen design.
 - Listen well to understand and translate information for instruction.
 - Negotiate with customers, vendors or stakeholders to manage expectations, goals and resources.
 - Present in meetings.
 - Sell ideas, proposals, or expertise to the management.
- 2. Build trust with others by acting positively, respectfully, and diligently.**
- Pay attention to details.
 - Be patient.
 - Respect others and treat them fair and professionally.
 - Be passionate and enjoy your job.
 - Self-motivated, committed and positive.
 - Adapt to criticism and changes without taking personally.
 - Set an example by working hard.
- 3. Apply research results and instructional theories to the practice of Web-based instructional design**
- Promote and apply instructional principles, theories, and research results to the instructional system design process.
 - Read widely on professional discussions and publications.
- 4. Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction.**
- Be creative and innovative.
 - Study the knowledge of the subject matter with interest and curiosity.
 - Maintain good computer skills in general.
 - Learn and try out emerging technologies and methodologies, be open minded.
 - Join professional organizations and social groups and attend the meetings and events, physically or virtually.
 - Network regularly with other professionals.
 - Get professional certification or recertification.
 - Update knowledge and skills by going back to school for formal training.
- 5. Identify and comply with legal, ethical, and regulatory requirements.**
- Keep proprietary information confidential and follow the required procedures.
 - Comply with participating employee's union regulations and policies.
- 6. Successfully complete multiple tasks and responsibilities.**
- Work on multiple projects at a time.

- Work with the combined roles of project manager, instructional designer, instructional developer in a given project.

Planning and Analysis

7. Conduct a needs assessment pertinent to the goals of the Web-based instruction.

- Analyze the given data (needs analysis, course requirements, performance analysis, existing content etc.) from customers or stakeholders.
- Identify the needs and performance gap.
- Align business goals to instructional objectives.

8. Analyze the characteristics of the target audience.

- Collect, understand and analyze learner characteristics.
- Analyze the characteristics of the learning environment.

9. Conduct task analysis and content analysis.

- Undertake content research and analysis utilizing existing or public resources.
- Conduct focus group to assist task analysis.
- Observe and analyze master performers to assist task analysis.
- Chunk or sequence instructional content for a course.
- Organize a set of related content into a curriculum or program.

10. Analyze the characteristics of available technologies and tools for the Web-based instruction project.

- Identify the capabilities of commonly available software and tools.
- Determine appropriate technique, technology, and media to support learning objectives and strategies.
- Evaluate and determine appropriate tools for design and development.
- Identify the potentials and limitations of WBI.

Design and Development

11. Determine appropriate instructional strategies and techniques.

- Create relevant learning objectives and corresponding instructional strategies.
- Design and develop appropriate interactivity or instructional activities to allow learners to practice, apply, and engage.
- Design visually appealing instructional materials.
- Add interesting and fun elements to the learning experience.

12. Design instructional materials for development.

- Create storyboards with descriptions for graphics, audio, video, interaction, and simulation, as well as audio scripts.
- Develop and utilize testing and review strategies for quality control.
- Write design documents.

13. Develop instructional materials.

- Ensure the interface is created and compatible with other media elements.
- Revise as necessary based on the feedback from customer(s) or sample audience.
- Create a prototype to communicate the look and feel and/or basic functionality.
- Create and edit graphics and other non-multimedia instructional materials.
- Produce and edit animation, video and audio Web materials.
- Do programming or coding with computer languages.
- Direct, monitor or act in the audio or video recording.

14. Evaluate and assess the Web-based instruction and its impact.

- Validate content or strategies by formative or summative evaluation or both with sample audience onsite or remotely.
- Develop and implement level 1 and/or level 2 evaluation plans.
- Develop and implement level 3 and/or level 4 evaluation plans.
- Run statistic research and analysis on the collected evaluation data.
- Recommend other instructional or non-instructional interventions using the evaluation data.

15. Design instruction to be appropriate for global usage.

- Ensure the instructional content is appropriate in language and culture for global audience and translation.
- Be sensitive to accessibility design.

Implementation and Management**16. Deliver and implement end products.**

- Deliver and implement the end product (to the customer) in a format or platform appropriate for the learning and management environment.
- Understand and utilize LMS or other implementation environment for implementation, training management and possibly performance improvement recommendation.
- Set up and schedule training sessions.
- Administrate registration process.
- Facilitate training sessions.
- Deliver instructions and training synchronously or asynchronously.

17. Plan and implement assignments and resources to achieve project goals.

- Manage budget.
- Lead, manage, and coordinate with team members.
- Support and coordinate with the project manager/ manager.
- Plan and stage a sign-off or buy-in process with the customer/stakeholders.
- Select and partner with the vendor or get support from another team.
- Keep track and report on project progress.

- Manage time efficiently.
- Organize and archive documents and other materials.
- Create project plans.
- Recruit and allocate human resources.

18. Promote efficiency and effectiveness for internal and external collaboration.

- Educate, mentor, and provide documentations to the team or other related staff about the right procedure.
- Create efficient workflow and platform for internal and external collaboration.
- Provide operational templates, other technical specifications, standards, and repository to achieve efficiency and consistency within the team.
- Work with remote team members, SMEs, and customers/vendors/stakeholders.
- Collect, establish and disseminate lessons learned and best practices within the team or for one's future work.

19. Manage relationship with Subject Matter Experts (SMEs), customers, or stakeholders.

- Accommodate customer's or stakeholder's needs, schedule, style, and culture.
- Build and maintain effective relationship with SMEs, customers or stakeholders, including managing difficult SMEs, customers or stakeholders.
- Educate SMEs and customers/vendors/stakeholders.

20. Apply business acumen to build a business case for the organization's instructional programs.

- Understand the overall business process and objectives.
- Write training/business proposals.
- Benchmark other organizations.

Table 9, presented above, reveals four domains of typical job tasks for expert instructional designers in WBI. The first domain is Profession Foundations, and it pertains to six topics:

- Effective communication skills;
- Interpersonal skills;
- Application of research results and theories;
- Continuous improvement of professional knowledge and skills;

- Legal and regulation compliances; and
- Multitasking skills.

The second domain is Planning and Analysis, and it pertains to four topics:

- Needs assessment;
- Learner characteristic analysis;
- Content and task analysis; and
- Technologies and tools analysis.

The third domain is Design and Development, and it pertains to five topics:

- Selecting instructional strategies;
- Design for development;
- Development;
- Evaluation and assessment; and
- Global appropriateness.

The fourth and last domain is Implementation and Management, and it pertains to five topics:

- Delivery and implementation;
- Project management;
- Collaboration;
- Stakeholder management; and
- Business skills.

In Table 9 (see page 50), the first domain Professional Foundations has six competencies and 29 supporting performance statements. The second competency domain Planning and Analysis has four competencies and 14 supporting performance statements, or 15 supporting performance statement, if “[a]sk the right questions to extract information from SMEs and stakeholders” in Professional Foundations supporting “Communicate effectively, in visual, oral, and written formats” competency is considered applicable in this domain supporting the “Conduct task analysis and content analysis” competency. The third domain Design and Development has five competencies and 21 supporting performance statements. The fourth domain Implementation and Management has five competencies and 27 supporting performance statements.

Research Questions 1, 2, and 3 have been answered by the list in Table 9.

The 20 competencies and the supporting 91 performance statements were not listed by any specific order, other than sequenced as they were identified in the interview transcriptions, which do not have any significance. The next section will present findings from data analysis to rank the competencies.

Criticality of Competencies

The 20 competencies were built into an online survey. The purpose of the survey was to invite perceptions on the identified competencies from other instructional designers in WBI. The result would answer Research Question 4: To what extent is the importance of each competency rated.

After three pilots and revisions, the survey was launched on February 27, 2012 at Zoomerang (see Appendix J). Announcements and open invitation were posted in the

evening at ISPI Global, ISPI Michigan Chapter, ASTD National, and eLearning Guild LinkedIn group discussion sites. The criteria of participating in the survey were explained in the Web postings. In addition to the public announcement, emails were sent to two previous interview participants who suggested they knew others who might be interested in participating. Another nine individuals were contacted by emails with the survey link and suggested deadline. Those nine individuals had agreed previously to participate in the research. The reason why they were placed in the survey group was either because they indicated their availability allowed only later involvement, or because they agreed to participate at the time when enough interview participants had already been recruited.

Within the first 24 hours of the survey launch, 7 responses were received. To increase the response rate, a change of strategy took place. The time of the daily discussion digests sent to members from the ten popular LinkedIn groups and the volume of member postings were investigated. It was discovered that the postings announcing this competency research survey at the high traffic LinkedIn group sites were unnoticed by anyone. Timing was the number one reason for this zero exposure. From the hour the announcements were posted at ASTD National, ISPI Global, and eLearning Guild LinkedIn groups in the early evening, to the hour when the daily discussion digests arrived at members' email boxes in the early morning, a good number of other members' new postings appeared to push down the competency research survey announcement and eventually out of the next day's daily discussion digests. To mitigate the competition, a few smaller LinkedIn groups were selected, such as Computer Based Training Professionals Group, Instructional Design & eLearning Professionals Group, Instructional Design & eLearning Performance Solutions Group, Freelance in

Instructional Design & eLearning Industry Group, and Friends of Innovative Learning Group. Another remedy was to submit a second announcement at ASTD national a few minutes prior to the distribution of the daily digest. It won the third place in the ASTD discussion digest of the day, but it was unable to verify the number of participants attracted from each LinkedIn group. By the number of discussion comments posted in the research survey announcement postings, ISPI Michigan Chapter Group and Instructional Design & eLearning Professionals Group attracted more participants than other groups. Additionally, 73 individual messages were sent to ASTD National paid members using the member directory function at the Website. The idea was to try and attract all the members with the senior instructional designer job title and moved on to contact other instructional designers when needed. Zero response was generated from this method in the first 24 hours. After the investigation at the ASTD mediated message, it was discovered that such message was not customized: The message subject appeared the same to everybody as “Contact from ASTD Member Directory”, with no font style or paragraph breaks in the message body. To make things worse, the contacting message initiated from ASTD member directory Website was not URL friendly: The survey link was broken, due to space forced into the URL for the text wrap. There was no remedy because ASTD National chose to hide members’ emails and therefore any contact had to be sent through a ASTD mediated message board where the researcher had no control of formatting. This method of recruiting ASTD members for survey was therefore aborted. By the end of February 29, 2012, the survey received 27 completed responses. One of the responses received was excluded because the participant explicitly indicated, by writing at the end of the survey, that an error was made: The highest rate was treated as the

lowest, the lowest was treated as highest. By March 3, 2012, 31 completed responses were received, and the survey officially closed. The excluded response was not included in the data analysis. As the result, 30 completed responses were counted toward the survey results.

It was noticed that the Zoomerang survey system had a flaw. Some participants didn't give a rating to all 20 competencies in Question 11. However, their responses were passed as completed responses. This system flaw resulted in less than 30 responses for ten competencies.

In closing, the survey received 70 visits, five partial responses, 31 completed responses, and six system screen-outs which automatically disqualified those who indicated in survey questions 2 and 3 that they did not meet the participating criteria.

The responses from 30 participants were calculated statistically. Table 10 lists the mean and standard deviation of each competency.

Table 10
Ranked 20 Competencies
Confidence Level at 95%

Competency	N	Mean	Median	Std. Dev.	Ranking
Communicate effectively, in visual, oral, and written formats	29	4.69	5	0.54	1
Manage relationship with Subject Matter Experts (SMEs), customers, or stakeholders	29	4.48	5	0.78	2
Determine appropriate instructional strategies and techniques	30	4.47	5	0.9	3
Evaluate and assess the Web-based instruction and its impact	30	4.27	5	0.94	4

Apply research results and instructional theories to the practice of Web-based instructional design	29	4.24	4	0.87	5
Design instructional materials for development	29	4.24	4	0.95	6
Build trust with others by acting positively, respectfully, and diligently	29	4.07	4	0.88	7
Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction	29	4.07	4	0.84	8
Identify and comply with legal, ethical, and regulatory requirements	29	4.07	4	0.75	9
Conduct a needs assessment pertinent to the goals of the Web-based instruction	30	4.07	4	0.94	10
Analyze the characteristics of the target audience	30	4.03	4	1.03	11
Analyze the characteristics of available technologies and tools for the Web-based instruction project	30	4.03	4	0.89	12
Promote efficiency and effectiveness for internal and external collaboration	30	3.97	4	0.85	13
Develop instructional materials	30	3.9	4	1.06	14
Plan and implement assignments and resources to achieve project goals	30	3.9	4	0.84	15
Apply business acumen to build a business case for the organization's instructional programs	29	3.9	4	1.06	16
Conduct task analysis and content analysis	28	3.89	4	0.96	17
Successfully complete multiple tasks and responsibilities	28	3.79	4	0.79	18
Deliver and implement end products	30	3.6	4	1.07	19

Design instruction to be appropriate for global usage	30	3.3	3	1.02	20
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Some competencies received varied responses. A few competencies had the same mean. This will be addressed in the next chapter. Overall, the participants responded positively by assigning high ratings to the majority of the competency items using a 1-5 Likert scale, with 1 as being not important, 2 slightly important, 3 important, 4 very important, and 5 most important. Only one out of the 20 competencies received a rating below 3.5, and that was a 3.3 in the “Design instruction to be appropriate for global usage”. Sixty percent of the competencies received a rating at or above 4.0. On average, the rating for all competencies was 4.05. Table 11 summarizes the level of support for the competencies in the four domains.

Table 11
Summary of the Level of Support for Competencies by Survey Participants
(N=30)

Domain	Rating Range								Total Across Domain	
	4.5-5.0		4.0-4.49		3.5-3.99		3.0-3.49		L.S.	%
	L.S. ^a	%	L.S.	%	L.S.	%	L.S.	%		
Professional Foundations	1	17	4	67	1	17	0	0	6	101
Plan and Analysis	0	0	3	75	1	25	0	0	4	100
Design & Development	0	0	3	60	1	20	1	20	5	100
Implementation & Management	0	0	1	20	4	80	0	0	5	100
Total Across Competencies	1	5	11	55	7	35	1	5	20	100

^aL.S. = Level of Support

It is difficult to tell which competency domain was more crucial for an instructional designer in WBI to perform at the expert level. It is fair to say that the identified competencies combined across the four domains enabled such instructional

designer to perform at the perceived expert level. Calculation of the weighted average is only an attempt to assess which domain weighed relatively more than the others:

- Professional Foundations: 4.16
- Plan and analysis: 4.00
- Design and Development: 4.04
- Implementation and Management: 3.97

Professional Foundations domain is at the top, and the rest three are very close on average.

To sum up, the top five competencies are:

- Communicate effectively, in visual, oral, and written format.
- Manage relationship with Subject Matter Experts (SMEs), customers, or stakeholders.
- Determine appropriate instructional strategies and techniques.
- Evaluate and assess the Web-based instruction and its impact.
- Apply research results and instructional theories to the practice of Web-based instructional design.

This section focused on the perception of instructional designers in WBI, whether they were experts or not, of the importance of each competency. The next section will discuss whether or not the work environments had any impact on competencies and performance.

Work Environments Impact on Performance

The impact of work environments on competencies and performance is determined by what happened in performance by the very person or persons, and not solely through perception. The data from the interview group were used and therefore its findings were applied.

Business Setting Impact

The distribution of competencies and performance statements by business settings (see Appendix K-1) shows that some of the performance statements were unique in different settings. They are:

Government and Military:

- Ensure the interface is created and compatible with other media elements (Design & Development domain).

Business and Industry:

- Present in meetings (Professional Foundations domain).
- Sell ideas, proposals, or expertise to the management (Professional Foundations domain).
- Set an example by working hard (Professional Foundations domain).
- Update knowledge and skill set by going back to school for formal training (Professional Foundations domain).
- Comply with participating employee's union regulations and policies (Professional Foundations domain).

- Work on multiple projects at a time (Professional Foundations domain).
- Ensure the instructional content is appropriate in language and culture for global audience and translation (Design & Development domain).
- Set up and schedule training sessions (Implementation & Management domain).
- Create project plans (Implementation & Management domain).
- Recruit and allocate human resources (Implementation & Management domain).
- Benchmark other organizations (Implementation & Management domain).

Healthcare:

- Be sensitive to accessibility design (Design & Development domain).

Independent Consultant:

- Keep proprietary information confidential and follow the required procedures (Professional Foundations domain).

The domains that were more likely to be business setting sensitive are the Professional Foundations domain and the Implementation & Management domain. The Plan & Analysis domain was least likely to be business setting sensitive.

Some performance statements were missing in a few business settings. For an easy interpretation, those performance statements were clustered by competencies. The competencies in which all the supporting performance statements were absent are listed below:

Government/Military:

- Comp. 5. Identify and comply with legal, ethical, and regulatory requirements (Professional Foundations domain).
- Comp. 6. Successfully complete multiple tasks and responsibilities (Professional Foundations domain).
- Comp. 15. Design instruction to be appropriate for global usage (Design & Development domain).

Education:

- Comp. 5. Identify and comply with legal, ethical, and regulatory requirements (Professional Foundations domain).
- Comp. 6. Successfully complete multiple tasks and responsibilities (Professional Foundations domain).
- Comp. 8. Analyze the characteristics of the target audience (Planning & Analysis domain).
- Comp. 15. Design instruction to be appropriate for global usage (Design & Development domain).

Healthcare:

- Comp. 5. Identify and comply with legal, ethical, and regulatory requirements (Professional Foundations domain).
- Comp. 6. Successfully complete multiple tasks and responsibilities (Professional Foundations domain).

Comp. 20. Apply business acumen to build a business case for the organization's instructional programs (Implementation & Management domain).

Independent Consultant:

Comp. 15. Design instruction to be appropriate for global usage (Design & Development domain).

Comp. 20. Apply business acumen to build a business case for the organization's instructional programs (Implementation & Management domain).

Table 12 lists the top five performance statements and the top three competencies in each business setting. The numbers in the table indicate the placements in the entire competency list or performance statement list for that specific business setting group. The list was generated by adding up the levels of support of a performance statement or competency from all participants in the group, in descending order. In the case of multiple items having the same accumulated level of support, more than five performance statements or more than three competencies are listed.

Table 12
Top Performance Statement and Competencies by Business Settings
(N=15)

	Top 3 Competencies	Top 5 Performance Statements ^a
Government / Military	<ol style="list-style-type: none"> 1. Plan and implement assignments and resources to achieve project goals. 2. Promote efficiency and effectiveness for internal and external collaboration. 3. Design instructional materials for development. 	<ol style="list-style-type: none"> 1. Lead, manage, and coordinate with team members. 2. Develop and utilize testing and review strategies for quality control. 2. Validate content or strategies by formative or summative evaluation or both with sample audience onsite or remotely. 2. Provide operational templates, other technical

		<p>specifications, standards, and repository to achieve efficiency and consistency within the team.</p> <ol style="list-style-type: none"> 3. Create relevant learning objectives and corresponding instructional strategies. 3. Create storyboards with descriptions for graphics, audio, video, interaction, and simulation, as well as audio scripts. 3. Revise as necessary based on the feedback from customer(s) or sample audience.
Business / Industry	<ol style="list-style-type: none"> 1. Plan and implement assignments and resources to achieve project goals. 2. Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction. 2. Develop instructional materials. 	<ol style="list-style-type: none"> 1. Promote and apply instructional principles, theories, and research results to the instructional system design process. 1. Lead, manage, and coordinate with team members. 2. Learn and try out emerging technologies and methodologies, be open minded. 2. Determine appropriate technique, technology, and media to support learning objectives and strategies. 3. Build and maintain effective relationship with SMEs, customers or stakeholders, including managing difficult SMEs, customers or stakeholders.
Education	<ol style="list-style-type: none"> 1. Manage relationship with Subject Matter Experts (SMEs), customers, or stakeholders. 2. Plan and implement assignments and resources to achieve project goals. 3. Communicate effectively, in visual, oral, and written formats. 	<ol style="list-style-type: none"> 1. Build and maintain effective relationship with SMEs, customers or stakeholders, including managing difficult SMEs, customers or stakeholders. 2. Accommodate customer's or stakeholder's needs, schedule, style, and culture. 3. Analyze the given data (needs analysis, course requirements, performance analysis, existing content etc.) from customers or stakeholders. 3. Develop and utilize testing and review strategies for quality control. 3. Lead, manage, and coordinate with team members.
Healthcare	<ol style="list-style-type: none"> 1. Determine appropriate instructional strategies and techniques. 2. Communicate effectively, in visual, oral, and written formats. 2. Plan and implement assignments and resources to achieve project goals. 	<ol style="list-style-type: none"> 1. Lead, manage, and coordinate with team members. 2. Be creative and innovative. 3. Communicate clearly and effectively in a language understood by developers. 3. Create relevant learning objectives and corresponding instructional strategies. 4. Identify the capabilities of commonly available software and tools. 4. Design and develop appropriate interactivity or instructional activities to allow learners to practice, apply, and engage
Independent Consultant	<ol style="list-style-type: none"> 1. Develop instructional materials. 2. Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction. 	<ol style="list-style-type: none"> 1. Produce and edit animation, video and audio Web materials. 2. Do programming or coding with computer languages. 3. Learn and try out emerging technologies and methodologies, be open minded.

3. Determine appropriate instructional strategies and techniques.	3. Design and develop appropriate interactivity or instructional activities to allow learners to practice, apply, and engage.
3. Plan and implement assignments and resources to achieve project goals.	3. Add interesting and fun elements to the learning experience.
	3. Create storyboards with descriptions for graphics, audio, video, interaction, and simulation, as well as audio scripts.
	3. Deliver and implement the end product (to the customer) in a format or platform appropriate for the learning and management environment.

^aA repetition of ranking numbers indicate a tie. This is applicable to the entire table.

Company Size Impact

The next work environment aspect this study examined is the size of the company. Companies with employees less than 100 were treated as small. Companies with employees between 101 and 2500 were treated as medium. Companies with employees above 2500 were treated as large. Below are the performance statements unique in different size companies:

Large Size Companies:

- Sell ideas, proposals, or expertise to the management (Professional Foundations domain).
- Be patient (Professional Foundations domain).
- Set an example by working hard (Professional Foundations domain).
- Update knowledge and skill set by going back to school for formal training (Professional Foundations domain).
- Comply with participating employee's union regulations and policies (Professional Foundations domain).
- Analyze the characteristics of the learning environment (Planning & Analysis domain).
- Conduct focus group to assist task analysis (Planning & Analysis domain).

- Ensure the interface is created and compatible with other media elements (Design & Development domain).
- Run statistic research and analysis on the collected evaluation data (Design & Development domain).
- Recommend other instructional or non-instructional interventions using the evaluation data (Design & Development domain).
- Be sensitive to accessibility design (Design & Development domain).

Medium Size Companies:

- Facilitate training sessions (Implementation & Management domain).
- Recruit and allocate human resources (Implementation & Management domain).

Small Size Companies:

- Keep proprietary information confidential and follow the required procedures (Professional Foundations domain).

On the contrary, some performance statements were not present in two business size companies. The competencies in which the entire set of supporting performance statements was absent are:

Medium Size Companies:

Comp. 5. Identify and comply with legal, ethical, and regulatory requirements (Professional Foundations domain).

Small Size Companies:

Comp. 20. Apply business acumen to build a business case for the organization's instructional programs (Implementation & Management domain).

Table 13 lists the top five performance statements and the top three competencies for each business size. The numbers in the table and the occurrences of ties were handled in the same way as previously.

Table 13
Top Performance Statement and Competencies by Business Sizes
(N=15)

	Top 3 Competencies	Top 5 Performance Statements ^a
Large Size Companies (>2500)	<ol style="list-style-type: none"> 1. Plan and implement assignments and resources to achieve project goals 2. Develop instructional materials. 3. Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction. 	<ol style="list-style-type: none"> 1. Lead, manage, and coordinate with team members. 2. Promote and apply instructional principles, theories, and research results to the instructional system design process. 3. Determine appropriate technique, technology, and media to support learning objectives and strategies. 3. Create and edit graphics and other non-multimedia instructional materials. 4. Learn and try out emerging technologies and methodologies, be open minded. 4. Create relevant learning objectives and corresponding instructional strategies.
Medium Size Companies (100-2500)	<ol style="list-style-type: none"> 1. Plan and implement assignments and resources to achieve project goals. 2. Manage relationship with Subject Matter Experts (SMEs), customers, or stakeholders. 3. Communicate effectively, in visual, oral, and written formats. 	<ol style="list-style-type: none"> 1. Lead, manage, and coordinate with team members. 2. Build and maintain effective relationship with SMEs, customers or stakeholders, including managing difficult SMEs, customers or stakeholders. 3. Promote and apply instructional principles, theories, and research results to the instructional system design process. 4. Manage time efficiently. 5. Develop and utilize testing and review strategies for quality control. 5. Deliver and implement the end product (to the customer) in a format or platform appropriate for the learning and management environment. 5. Accommodate customer's or stakeholder's needs, schedule, style, and culture.
Small Size Companies	<ol style="list-style-type: none"> 1. Develop instructional materials. 	<ol style="list-style-type: none"> 1. Develop and utilize testing and review strategies for quality control.

(<100)	2. Communicate effectively, in visual, oral, and written formats.	2. Design and develop appropriate interactivity or instructional activities to allow learners to practice, apply, and engage.
	2. Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction.	3. Ask the right questions to extract information from SMEs and stakeholders.
	3. Design instructional materials for development.	3. Create storyboards with descriptions for graphics, audio, video, interaction, and simulation, as well as audio scripts.
		3. Revise as necessary based on the feedback from customer(s) or sample audience.

^aA repetition of ranking numbers indicate a tie. This is applicable to the entire table.

Project Team Size Impact

The third work environment aspect this study investigated is the size of the project team. The team included members who were directly responsible for the production of the project and were billable with the project budget. For example, contracted vendor was counted toward the project team, while the external SMEs were not.

A team with over eight team members for the given project was defined as a large team in this study. A three to seven member project team is a medium team, and a one to two member project team is a small team.

The performance statements unique in different size teams are:

Large Project Team:

- Update knowledge and skill set by going back to school for formal training (Professional Foundations domain).
- Ensure the interface is created and compatible with other media elements (Design & Development domain).
- Recruit and allocate human resources (Implementation & Management domain).

- Write training/business proposals (Implementation & Management domain).

Medium Project Team:

- Set an example by working hard (Professional Foundations domain).
- Comply with participating employee's union regulations and policies (Professional Foundations domain).
- Be sensitive to accessibility design (Design & Development domain)
- Deliver instructions and training synchronously or asynchronously (Implementation & Management domain).
- Benchmark other organizations (Implementation & Management domain).

Small Project Team:

- Keep proprietary information confidential and follow the required procedures (Professional Foundations domain).

The competencies in which the entire set of supporting performance statements was absent in terms of the project team size are:

Large Project Team:

- Comp. 5. Identify and comply with legal, ethical, and regulatory requirements (Professional Foundations domain).

Small Project Team:

- Comp. 20. Apply business acumen to build a business case for the organization's instructional programs.

This absent list matches the company size absent list. The same extent of matching was not present in the two unique lists. However, the majority items in the unique competency list regarding the project team size also appeared in the unique competency list regarding the company size.

Table 14 displays the top five performance statements and the top three competencies for each business size. The numbers in the table and the occurrences of ties were handled in the same way as previously.

Table 14
Top Performance Statement and Competencies by Project Team Sizes
(N=15)

	Top 3 Competencies	Top 5 Performance Statements ^a
Big Project Team (>=8)	<ol style="list-style-type: none"> 1. Plan and implement assignments and resources to achieve project goals. 2. Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction. 3. Develop instructional materials. 	<ol style="list-style-type: none"> 1. Lead, manage, and coordinate with team members. 2. Promote and apply instructional principles, theories, and research results to the instructional system design process. 3. Create efficient workflow and platform for internal and external collaboration. 4. Learn and try out emerging technologies and methodologies, be open minded. 5. Determine appropriate technique, technology, and media to support learning objectives and strategies. 5. Create relevant learning objectives and corresponding instructional strategies. 5. Revise as necessary based on the feedback from customer(s) or sample audience.
Medium Project Team (3-7)	<ol style="list-style-type: none"> 1. Plan and implement assignments and resources to achieve project goals. 2. Communicate effectively, in visual, oral, and written formats. 3. Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction. 	<ol style="list-style-type: none"> 1. Lead, manage, and coordinate with team members. 2. Build and maintain effective relationship with SMEs, customers or stakeholders, including managing difficult SMEs, customers or stakeholders. 3. Promote and apply instructional principles, theories, and research results to the instructional system design process. 4. Design and develop appropriate interactivity or instructional activities to allow learners to practice, apply, and engage 5. Manage time efficiently
Small Project	<ol style="list-style-type: none"> 1. Develop instructional materials. 	<ol style="list-style-type: none"> 1. Produce and edit animation, video and audio Web materials.

Team (<=2)	2. Plan and implement assignments and resources to achieve project goals.	2. Create and edit graphics and other non-multimedia instructional materials.
	2. Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction.	2. Learn and try out emerging technologies and methodologies, be open minded.
		3. Work with the combined roles of project manager, instructional designer, instructional developer in a given project.
		3. Deliver and implement the end product (to the customer) in a format or platform appropriate for the learning and management environment

^aA repetition of ranking numbers indicate a tie. This is applicable to the entire table.

This section presented the findings that illustrated the possible impact of work environments on competency and performance. In different company settings, companies of different sizes, and project teams of varied sizes, the expert instructional designers in WBI demonstrated unique behaviors. The performance statements appeared only in certain environment suggests those performance may be dominant in that environment, while the absence of competencies suggests those competencies may be latent in such environment. The lists of top competencies and performance statements were attempted to illustrate the performance characteristics of each work environment.

This section answered research question 5.

The Perception of Future WBI from Expert Instructional Designers

The last research question was about the future of WBI, perceived by the experts in the field, and how the professionals should respond to it. Web-based instruction is a dynamic field. When the name for the field changed, the scope shifted, or a new dimension was added, or a path was revealed. The experts, as a leading role in the profession, must be aware of the dynamics and be prepared for. The information in this section presents what the participants felt was happening or was imminent and their advice for peers and other related professionals.

What Is the Future Like?

The perceptions on future focused on five topics:

- Social media for instruction;
- Mobile learning;
- Cloud learning and collaboration;
- Virtual/Online classrooms; and
- More on-demand and engaging WBI.

The comments by each participant were extracted and simplified in Appendix M.

What Should We Do?

The advices from the interview participants for peers and new graduates are summarized and listed in Appendix N. The most frequently mentioned advices were to:

- Join professional organizations.
- Go to meetings, conferences and events.
- Read extensively and regularly.
- Try out new technologies and tools.

The overall picture predicted by the expert instructional designers in WBI is dynamic. It is therefore challenging for instructional designers to keep pace with the innovations. We would otherwise be left behind, as two participants commented.

CHAPTER 5 DISCUSSION AND CONCLUSIONS

The foremost purpose of this study was to identify the domains, competencies and performance statements present in expert instructional designers in Web-based instruction (WBI) by the use of the IBSTPI model. The IBSTPI model formed the conceptual foundation for the structured interviews. The inquiry of this study was to further probe and discover the order of importance for each competency. A qualitative online survey was conducted to fulfill this second purpose. The above identification, with a different approach of data analysis, yielded another discovery of work environment influence on competencies. It was also of interest of this study to bring up a discussion on the future of Web-based instruction, and on how instructional designers should be prepared in view of the new direction. This chapter discusses conclusions and implications induced from the findings of this study.

Competencies and the Ranking

The structured interview produced a list of 20 competencies, which were subsequently validated and ranked by the online survey. The final list corresponded in many ways with the competency list from the IBSTPI competency study for instructional designers completed in year 2000 (Richey, Fields & Foxon, 2001). Nevertheless, the competency list in this study was distinctive. For example:

- The competency *Communication effectively in visual, oral, and written format* was ranked number one in both lists.

- *Evaluate and assess Web-based instruction and its impact* was ranked number four, while its counterpart competency in the IBSTPI list *Evaluate and assess instruction and its impact* was ranked number five.
- The competency *Identify and comply with legal, ethical, and regulatory requirements* was regarded more important in this study than the same competency in the IBSTPI study, ascending from rank 23 to rank 9 in this study.
- *Conduct a needs assessment pertinent to the goals of Web-based instruction* was regarded less important in this study than the equivalent competency *Conduct a needs assessment* in the IBSTPI study, descending from rank two to rank 10 in this study.
- *Analyze the characteristics of the target audience* was ranked number 11 in both lists.
- *Develop instructional materials* was ranked number 14 in this list versus number three in the IBSTPI list.
- This study also generated two new competencies regarding interpersonal skills: *Manage relationship with Subject Matter Experts (SMEs), customers, or stakeholders* and *Build trust with others by acting positively, respectfully, and diligently*. The latter also carried an attitude aspect. They were ranked number two and seven respectively.
- The last competency *Design instruction to be appropriate for global usage* in this study was not a standalone competency in the IBSTPI study, but rather a supporting performance statement.

Consistent with researches and literature on expert competence (Shanteau, 1992), the insistent competency for all Web-based instructional designers was effective communication skill which is necessary in interactions with team members, clients, and leaders, as well as conveying instructional messages to target audience (Richey, Fields & Foxon, 2001).

Of course, a few competencies in the two lists do not always have the same associations. *Develop instructional materials*, for example, supported in the IBSTPI study by three statements (Richey, Fields & Foxon, 2001), while the same competency in this study was supported by seven statements specifically aligned with Web-based instruction. The fact that the two competency lists differ in many ways is not surprising, because the IBSTPI competencies “speak to generic design issue” (Richey, Fields & Foxon, 2001, p. 40), while the competencies in this study are applicable only to WBI instructional design.

It appeared in this study that the overall instructional design process for Web-based instruction did not differ significantly from the conventional instructor-led instruction. Nine out of 15 interview participants mentioned that the ADDIE model or variations of the ADDIE model were applied. The difference revealed in this study was the amount of efforts and time each instructional system design (ISD) phase was contributed to. The levels of support in Table 11 (see page 61) reflected that the Implementation & Management phase was equally important as the Design & Development phase for the survey participants, and the Planning & Analysis phase was the least important. Similarly, the interview participants on average spent 31.6 percent of effort or time in implementing and managing, 26.6 percent in designing and developing,

26.5 percent in professional foundation skills (namely communication, interpersonal, attitude, professional development). The last and the least was planning and analyzing in which 15.3 percent effort or time was spent. This is contradictory to the traditional ideas about expert instructional designers, where Rowland (1992), Le Maistre (1998), and Perez & Emery (1995) described expert designers as conducting long analysis, carrying out comprehensive front end analysis, or spending more time on analyzing problems. However, such discrepancy is not surprising. It is very much determined by the nature of a training department in an organization or an independent consultant as a stand-alone business serving Web-based instruction needs - many of them were approached with WBI requests by customers, with analysis very much completed. Employing dedicated needs analysis team apart from instructional design team was identified as one of the methodologies to increase instructional design efficiency (Roytek, 2010). The term human performance improvement appeared as a jargon to many employers than a clear application to Web-based instruction designers (Hansen, 2010). Another reason for the weakened analysis was the unwillingness to invest money and time by the customers or stakeholders on this step. "Knowledge of the analysis and evaluation stages of instructional technology are very important for business and industry; however, research shows that these are often the stages of the ID model that are skipped when there are shortage of time or money" (Larson, 2004, p. 34). Consequently, there were fewer opportunities for instructional designers in WBI, novices or experts, to do an extensive analysis, except analyzing the content, target audience, and tools. Sometimes those could also be given, or pre-determined by the budget. For instance, survey participant number nine reported at the end of the survey, "In my situation, the tool for Web-based

instruction has already been selected. There is minimum opportunity to analyze other options.”

Another defining feature of WBI is its Web nature. As interview participant 010 commented:

...Web is global, period. Web is not regional. So Web and global are synonymous. And if you've got a global issue, it's a Web issue. So we were working through things like global English, that was not just happening in UFO, that was a major focus for us, that were tasks happening all over the world. And understanding how all of this have been communicated. We had those aspects as well...(lines 227-342, Transcription for Interview 010).

It is thus indispensable, not unexpected, to have a separate competency to reflect this global aspect. “The interest in recent years on the interaction between culture and educational technology is growing” (Rogers, 2007, p. 198).

Environment Impact on Competencies and Performance

The 20 competencies ranked in Table 10 (see page 59) revealed that five competencies had a standard deviation larger than one. The rest were below one standard deviation. It indicated that the opinions of the participants in the survey were not dispersed; however, a few of them were slightly more varied from the mean than the rest. Errors made by some participants could be counted partially for the variability, such as the self-reported survey participant who mis-read the instructions and thus was excluded from the data analysis. Another source for the variability could be stemmed from varied opinions due to the impact of work environments, as discovered in findings presented in Chapter 4.

It is unclear the extent of the impact of the work environment has on competencies and their performance statements, because the participants were not equally

selected from each work environment. However, it is clear that the different work environment had an impact.

The findings by business settings revealed a substantially less impact on competencies and performance statements than the findings by company sizes and by project team sizes. The expert WBI instructional designers from both large size companies and medium size companies seemed to have contributed the most efforts or time on the project management related competency *Plan and implement assignments and resources to achieve project goals*. At the performance level, the statement *Lead, manage, and coordinate with team members* was at the top in both types of companies. At the domain level, the Implementation & Management domain had the highest level of support for both types of companies. In contrast, expert WBI instructional designers from small size companies appeared to have paid the most efforts or time to develop instructional materials. More specifically, they were more focused on developing the testing and review strategies, and in designing and developing interactivities than other expert WBI instructional designers. Consequently their number one strength lay in the Design & Development domain. Interestingly, expert WBI instructional designers from large size companies were also very strong in the Design & Development domain, with *Develop instructional material* as their second top competency. Lastly, expert WBI instructional designers in medium size companies and small size companies shared the communication skills as the third and second competency respectively.

Looking at the impact of project team sizes on competencies and performance statements, it was not difficult to notice a similar pattern. At the domain level, expert WBI instructional designers working on big project teams and medium project teams

demonstrated strength in the Implementation & Management domain, while those working on small project teams were strongest in the Design & Development domain. This matches the impact of company size when domains are regarded. At the competency level, project team sizes showed no significant differences of its impact - project management skills were equally strong among the expert WBI instructional designers working on three types of teams. *Develop instructional materials* was another strong competency for expert WBI instructional designers on both big and small project teams. Communication skills appeared to be more dominating among the expert WBI instructional designers on medium project teams than on other two teams. At the performance statement level, team management skill, theoretical foundation on instructional design process, and collaboration were the most observed behaviors in the expert WBI instructional designers functioning on big project teams. Similarly, team management skill, interpersonal skills, and theoretical foundation on instructional design process weighted most among those on the medium project teams. For the small project teams, development skills including creating animated or multimedia materials, non-interactive materials (that is, text and graphics), and constantly learning new tools were highly critical. A noteworthy performance for the expert WBI instructional designers on small project teams was the presence of multiple functional roles in a given project. More often they had to become project manager, instructional designer, and developer simultaneously when compared to the instructional designers on big or medium teams.

It was noticed in this study that WBI instructional designers from large companies do not always have a big team to work with, and small companies do not always have a small team for WBI projects as well. It is safe to state, nevertheless, according to the

findings discussed above, that expert instructional designers in large size companies or big teams must demonstrate strong competencies in team and project management, because they are more likely to interact with people from other teams, or to be the leaders of the WBI projects. Another challenge for expert instructional designers on big teams is that the scope of a WBI project can become very large, and the complexity of technology and involvement of many developers require the lead instructional designer to be very strong in managing development, such as coordinating collaboration, determining right development strategies (Thach, 1994; Simon, 2003). For an instructional designer who is to complete a WBI project all by herself or himself, or by two people, their development competencies have to be equally strong, if not stronger than other competencies, because they are solo performers or generalists (Lori, 2000) who have to wear many hats and wear them well in order to “survive and prosper” (p. 1).

Implications of the Study

One of the significance of this study is to help instructional design professionals and organizations who are interested in WBI to grow in the long run. Current instructional design programs can also take advantage of the results for program design to better meet individual needs and organizational expectations for their graduates.

Implication for Individuals

Instructional designers grow their professional skills and competencies in two ways: Formal education and continuous improvement (Tennyson, 2001; Larson, 2004; Hansen, 2010). Education and experience are the two sides of a scale, with the experience being heavier because it is an attribute possessed by experts and distinguishing them from novices and apprentices (Tennyson, 2001). A few interview participants admitted that

they learned almost everything on the job. It is also a fact that over 66 percent survey participants and over 93 percent interview participants earned a degree at or above Master's. Whether the formal education was intended for the credential purpose (Hart, 2008), or for interacting with other professionals at the same professional level (line 43, Transcription for Interview 010), or to acquire knowledge on related learning theories and research skills (Larson, 2004), it has becoming a trend for instructional designers in WBI to have a Master's degree in a major related to instructional design.

Other than obtaining education through academic programs, individual WBI instructional designers can also self-assess their existing competencies against the new standards and competencies defined in the profession as a means of "professional development planning guide" (Richey et al., 2001, p. 93). It is necessary to fill the gap by taking formal trainings such as workshops, seminars, certification programs, or by informal learning such as self-teaching and trying on their own, or learning from peers in professional presentations and discussion. This is "a lifetime effort" (Tennyson, 2001, p. 359). By definition, expert instructional designers in WBI should never stop improving and expanding their knowledge, skills and attitudes about innovative instructional ideas, Web capabilities, tools, models, and limitations. It is crucial to immerse themselves in learning emerging technologies in order to design effective learning programs for new generations (ASTD, 2010). As recommended by many experts in the study, instructional designers in WBI should join one or two professional organizations and network with other professionals. Reading publications extensively and regularly in print or online is part of the continuous improvement efforts. It is not about whether there is available

time; it is about if and when an expert instructional designer in WBI wants to be left behind, as a couple of interview participants asserted.

The Web technology upgrades rapidly. For example, the popularity of smart phones and tablets brought up a brand new instructional topic: Mobile Learning, or mLearning which was unthinkable two years ago (Galagan, 2012). The instructional designers in WBI should update their competencies as frequent whenever the WBI field undergoes a significant change. Self-assessment and continuous improvement are two doors to that path (Tennyson, 2001). Learning and improving, formally and informally, and being open minded are the keys to those doors. It is not hard to recognize that an expert stops being an expert the day he or she stops meeting required competencies.

Implication for Organizations

Some organizations use competency modeling to recruit talent (Rothwell, 1999; Teodorescu, 2004; Yoon & Lim, 2010). Organizations “[d]esign hiring profile and performance assessments to gauge competence levels before hiring” (Teodorescu, 2004, p. 11). In the case of hiring an expert instructional designer in WBI, a senior level instructional designer is usually desired. The names for those positions vary from Senior Instructional Designer to Senior eLearning Instructional Designer to eLearning Technologist, and so on. The job descriptions and qualifications differ to a greater extent than the job titles. It is often noticed that different sets of competencies have been sought after by different organizations (Hansen, 2010). It is, in a way, a proof that competencies are environment sensitive (Larson, 2004). On the other hand, the variations in competency requirements suggest a lack of standards in determining professional competencies. Recruiting expert instructional designer for WBI is no exception. The 20

competencies identified in this study can be applied to determine the core competencies across all work environments, although they are more applicable to the business and industry environment. The performance statements can be used to define the job, or assist in developing professional improvement opportunities (Yoon & Lim, 2010). The trend of increased demand for domain specific or environment specific knowledge by organizations in recruiting instructional designers cannot be explained by this study. However, it is believed that corporate recruiting can take a more strategic approach (Hansen, 2010).

Other than talent recruiting, the identified competencies can also be useful for employee career development, and rewards and compensation determination (Marrelli, 1998). True experts in WBI are hard to come by and are not easily retained. Moreover, novices and other instructional designers in WBI should be encouraged to grow and to reach the next level of expertise. To make both happen, it is essential to have a system in place for professional development and recognition. A good example would be defining and sharing the skill sets or competency requirements for each level of a job (Bozarth, 2012), so that instructional designers or would-be instructional designers in WBI have measureable and achievable objectives if their career goal is to work in the WBI field or to be experts in the WBI field. The rewarding and compensation system can be created in the same manner. It is important to keep in mind that the competencies are more than about skills, they are also related to knowledge and attitude. Measuring and evaluating the right competencies is the key to the success of such systems. In addition, knowledge, skills, and attitude can evolve and shift over time; reaching the highest possible expert level in a particular position does not suggest it is a one-time effort. In other words,

maintaining a level of expertise implies constant updating (Tennyson, 2001). The professional development, recognition, and reward system should incorporate this on-going component into the systems.

Organizations can move one step further to support professional development: Encourage and sponsor professional development activities within and beyond workplace. It may give the impression that this is a zero to little return on investment. However, as expressed by the interview participants in the study, the expert instructional designers in WBI have a passion for communicating with peers in and out of the organizations, and they have the need to stay up-to-dated and get involved in other professional activities. Supporting and sponsoring social learning from the management level can be very beneficial to both the organization and employees (ASTD, 2010). The appreciation of the employees can also be turned into loyalty and therefore become part of retention strategy. Most of all, the information and passion the experts acquired and got enhanced outside workplace can be applied back to instructional and training design in the organizations.

Competencies and performance statements can be put into creative use in an organization in numerous ways. Building employee profiles that include skill inventories, for example, provides opportunities for employees to link with others who have skills they lack (Bozarth, 2012). Granting access to experts or expertise enables cross functional resource sharing, which also accommodates the “[w]atch for opportunities that training and development may be missing” (Bozarth, 2012, p. 67).

Implication for Educators

Higher education institutions play a key role in preparing graduates for workforce (Larson, 2004). Having program curricula that match the current job market needs is

crucial for the success of a program and its graduates (Larson, 2005). An interview participant complained, “When I got out of school I was at a disadvantage because the only thing we learned was Dreamweaver, and then when I entered the workforce nobody was using Dreamweaver” (lines 579-582, Transcription of Interview 016). She asked to be trained with a spectrum of tools and skills. Interview participant 007 strongly recommended to introduce business process into curricula, “[T]he instructional designer should have an introduction to business processes. It’s part of the core curriculum if they are planning in going into business. Yeah, I think now you’re going to have an introduction to Six Sigma, you have an introduction to QA, you ought to have an introduction on how to design a business process” (lines 275-279, Transcription of Interview 007).

Larson (2004) raised a topic on whether it is more preferred to have a generalist academic program, career environment specific program, or a flexible program allowing students to choose the hours of coursework. The results showed that the generalist programs received higher rating than career environment specific program. On the other hand, another set of data indicated that most instructional design practitioners felt “less prepared for the contextual elements of the subject matter and competencies related to their career environment” (Larson, 2004, p. 192).

While further research on this has been called for, the job market is increasingly seeking environment specific instructional design knowledge and skills in the candidates. Some may even believe that knowledge and skills on proprietary systems and programs are expected. It is not the intent of this study to debate whether such expectations are reasonable, but the instructional technology program in higher education institutions can

take some of the messages from job market into consideration when modifying program curricula, to better prepare their instructional technology graduates for the constant changing Web-based instruction field (Hansen, 2010).

To have a good and continuous number of competent expert instructional designers in WBI, it is truly a joint effort of individuals, organizations, and educating institutes (Moller et al, 2008). WBI, as its new name eLearning has drawn the picture for us, is shifting the perspective from teaching to learning. With the empowering Web technologies and capacity, it is imperative for every one of us to embrace changes.

Limitations of the Study

This study used both quantitative and qualitative research methods to identify and rank competencies demonstrated by expert instructional designers in WBI. One of the limitations of this study was that the sample was not randomly selected for the interview group nor for the survey group. Close screening was required for the interview group to ensure that all participants met the criteria. About half of the participants of the survey group were self-selected, another half were approached by the researcher, due to the limited access to sufficient sample within the limited timeframe. The second limitation is the relatively small sample size, especially for the survey group. The accuracy of the competency ranking might therefore be compromised. The third limitation is the possible presence of bias. The five criteria for interview participants were specified by the researcher, following suggestions from related literature, and therefore the findings based on the interviews of those participants may be representative of only expert instructional designers in WBI meeting these potentially biased criteria. The ability to generalize the findings to other population has been limited.

Recommendations for Further Research

Since WBI is changing at a faster pace, a repeated study should be initiated every five years to closely monitor the changes in competencies and performance statements for expert instructional designers in WBI. It is not impossible that the Web-based instruction field will be re-defined in the near future. A new study would then be desired sooner.

One area for further research is to seek perception from a much larger sample of experts as well as non-expert practitioners in WBI. A more thorough investigation of the work environment impact on competencies and performance statements could be achieved by collecting information from participants from an even distribution in each work environment. Another recommendation for further research is to extend this study by comparing the discrepancies between what competencies expert instructional designers in WBI are demonstrating and what competencies are demanded in the job postings. Lastly, capturing perception from other WBI related professionals, such as SMEs, instructional developers, learning or training managers, and educators might supplement what expert instructional designers have shown and perceived.

Conclusions

From the qualitative and quantitative analysis of the findings, this study has answered six research questions:

Research question 1. What are the domains in which expert instructional designers in WBI function?

Professional Foundations, Planning & Analysis, Design & Development, and Implementation & Management are the four domains identified in IBSTPI study and have been confirmed applicable in this study.

Research question 2. What are the competencies that expert instructional designers in WBI demonstrate?

After analyzing 15 interviews of expert instructional designers in WBI, 20 competencies have been identified. They include: Communicate effectively, in visual, oral, and written formats; build trust with others by acting positively, respectfully, and diligently; apply research results and instructional theories to the practice of web based instructional design; update and improve professional knowledge, skills, and attitudes pertaining to web based instruction; identify and comply with legal, ethical, and regulatory requirements. The complete list and ranking can be found in Table 9, page 50.

Research question 3. What performance statements support each competency of expert instructional designers in WBI?

The interview data yielded 91 performance statements to support 20 competencies in four domains. They include: Analyze the given data (needs analysis, course requirements, performance analysis, existing content, etc.) from customers or stakeholders; create relevant learning objectives and corresponding instructional strategies; ensure the interface is created and compatible with other media elements; develop and utilize testing and review strategies for quality control; create storyboards with descriptions for graphics, audio, video, interaction, and simulation, as well as audio scripts. The complete list of performance statements can be found in Table 9, page 50.

Research question 4. To what extent is the importance of each competency rated?

The competencies have been rated with a choice from 1 to 5 by 30 participants in an online survey. The calculation of means generated a ranked competency list, found in Table 9, page 50. Communication skills, managing relationship with customers,

determining instructional strategies and techniques, evaluating and assessing the Web-based instruction and its impact, applying research results and instructional theories to the practice of Web-based instructional design are the top five competencies.

Research question 5. To what extent does the work environment impact competencies and performance statements?

The appearance and disappearance of competencies and performance statement in the interview group have been analyzed and compared against five business settings, three different company sizes, and three project team sizes. It was discovered that business settings imposed a less significant impact than company sizes and project team sizes on competencies and performance statements. Some competencies and performance statements were uniquely present in specific work environment, while some others were not present at all in particular work environment. The most demonstrated competencies and performance statements in the interview group revealed different patterns for different work environments. Overall, the bigger a company or instructional project team was, the more team and project management skills were demonstrated by the WBI experts. The WBI expert instructional designers working in big size companies exhibited development skills as strong as those working on small project teams. The difference was the WBI experts in big companies had to handle more collaboration and strategies determination for development, and the WBI experts on small teams had to take hands-on production themselves. In other words, it is more demanding of WBI expert instructional designers on small project teams as they have to take more responsibilities.

Research question 6. What direction do expert designers anticipate for WBI that may impact practitioners in WBI?

Expert instructional designers in WBI predicted five trends: Social media for instruction, mobile learning, cloud learning and collaboration, virtual or online classrooms, and more on-demand and engaging WBI. To prepare for these changes, instructional designers in WBI should not only actively speculate on how they can use for Web-based instruction, but also participate in discussions and other professional events to gain more insights and reflections. Experimenting with emerging tools and techniques is of equal importance. It is crucial for expert instructional designers in WBI to be passionate in learning new ideas and embracing innovations.

APPENDIX A COMPETENCY STUDIES BY CAREER ENVIRONMENTS

Competency study	Title and findings
Atchison (1996)	<i>Roles and competencies of instructional design as identified by expert instructional designers.</i> This PhD study utilized the critical incident technique in a case study and interviewed 15 expert instructional designers in an effort to gain new understanding about the nature of ID work. Atchison identified nine role themes of reflector, ethicist, humanist, collaborator, advocate, evaluator, manager, marketer, and entrepreneur, and hypothesized that the role of context may provide an initial understanding of how environment shapes expert performance. Limitations: small sample size, selection of experts based on professional organization membership rather than through evaluation of expert status.
Barnum (1979)	<i>An analysis of instructional systems design as reflected in formal education, industry, and military institutions: Theory vs. application.</i> PhD study comparing the theoretical design model construct used in academia with the applied ISD model used in training or industrial environments. Found that minor differences between education and military were due to the military's task and skill-oriented approach, and that the academic model could be improved through exchange with the pragmatic training model.
Berge, et al. (2002)	<i>The increasing scope of training and development competency.</i> An extensive review of the literature on competencies aimed at showing trends in training & development over the last three decades. Most apparent changes: shift to performance improvement and use of technology.
Branch, Moore, & Sherman (1988)	<i>Evaluating potential instructional technology and design professionals for academic and business settings: Criteria for decision-making.</i> An article reporting the results of a survey of members of AECT and NSPI to determine whether business and academic employers used different criteria when hiring. Concluded that distinct business and academic markets exist for IDT graduates and it may be necessary to design curricula and coordinate experiences that specifically prepare students for each market.
Byun (2000)	<i>Identifying job types and competencies for instructional technologists: A five-year analysis.</i> PhD study that analyzed emailed job postings sent to an IT department over a 5-year period. Prominent skills for business settings: IDD skills, communications, management, computer application skills; for educational settings: media skills and teaching/delivery skills; for non-profit/government/military settings: evaluation skills. Trends noted: increased demand for Web/online experience, media application skills as opposed to computer application skills, and communication and interpersonal skills.
Cecere (1983)	<i>A comparative study of media production practices in higher education and business/industry.</i> PhD study comparing exemplary practices in media production facilities in business & industry with those in academia. Using an alpha-type external needs assessment, his comparison determined significance for planning academic program curricula.

Heideman (1991)	<i>A forecast of the competencies required for effective performance by instructional technology practitioners in the year 2000.</i> PhD study that surveyed IT practitioners from business and academia to forecast potential competencies required in the year 2000. Found no significant difference in the perceptions of the two groups and recommended that IT educators emphasize competency selection and application in the curriculum in addition to IDT task performance.
Kapp (1997)	Measuring training competencies using the analytic hierarchy process. PhD study which developed a hierarchy instrument to measure competencies and supporting behavioral skills needed to “excellently” deliver a training message in a corporate setting; can be used to develop a trainer curriculum.
Moyer (1993)	A comparative study of entry-level competencies for educational communications and technology personnel. A PhD study that surveyed faculty and practitioners on the competency requirements across settings found no significant difference between the perceptions of academics and practitioners. Limitations: lack of diversity in population of his questionnaire review panel, & questionable suitability of sample used in the alpha needs assessment.
Piskurich & Sanders (1998)	ASTD models for learning technologies: Roles, competencies, and outputs. An ASTD manual resulting from competency studies in business and industry. Contains a self-assessment instrument.
Stolovitch, et al. (1995)	Skill sets for the human performance technologist. Article recommending HPT skill guidelines be gleaned from sources such as current practice observation, the literature, professional societies, recognized practitioners, and knowledgeable clients. Presents suggested basic and advanced skills, future skill needs and suggestions for academic programs.
Trimby (1982)	Entry level competencies for team members and supervisors/managers on instructional development teams in business and industry. PhD study to identify IDT competencies for business and industry. Surveyed supervisors/managers and found that highest-ranking competencies dealt with interpersonal communication skills (effective listening, attitude formation, adapting to change, establishing credibility with a group); includes recommendations for preparation programs including the study of competency areas rather than individual competencies.

APPENDIX B STRUCTURED INTERVIEW QUESTIONS

1. Good Morning/Afternoon/Evening, thanks for taking time with me. Can you tell me your current job title?
2. How long have you been working in the current position?
3. What's your age range: 25-35, 36-45, 46-55, and 56 above?
4. Would you say you are actively involved in instructional design?
5. Are there any other positions have you held before, that were related with instructional design?
6. How many years accumulatively do you estimate you have worked in design/development for WBI?
7. In those WBI projects, how many years accumulatively do you estimate have served as a lead instruction designer/developer?
8. Describe your education background.
 - a. What's the major of your bachelor's degree
 - b. Did you have postgraduate education: Master's, or Ph.D.?
 - c. Have you had any other training on instructional design?
9. What's the business nature of your current organization: business/industry, education, government/military, health care, multiple setting, other?
10. What's the estimated size of the organization you are working for?
11. Can you tell me a Web Based Instruction project you are very proud of or got highly recognized? (Can you tell me a Web Based Instruction project that you think you learned a lot? Repeat question 11 to 14 in necessary)
 - a. How many team members in the project?

- b. How long did it last?
- c. What was the project about, was it about how to complete a step, process, use systems, or how to perform physical jobs, or change attitude/value?
- d. In the next few questions, I am going to ask you about the processes, steps and tasks you went through from very beginning to the end of the project
 - i. Describe the project in a very high level (the process by stages)
 - ii. Describe the project in as much low level (steps, tasks) as possible
 - iii. What event/communication marked the beginning of the project?
 - iv. What event/communication indicated the completion of the project?
 - v. What was your role in the project?
 - vi. What software and services were used?
 - vii. What hardware and devices were used?
- e. What were the outstanding features of this project?
- f. Did it occur to you that you wish to have done the project differently? (Or any challenge during the project?) How differently? (What were the challenges?)
- g. What were the solution(s) to the challenge(s)?

12. With the above mentioned project in mind, I am going to task you about what you used to accomplish the project:

- a. What specific knowledge, concepts, and ideas that helped you?
- b. What soft skills did you use?
- c. What hard skills did you use?

- d. What attitude did you realize that was helpful for the success of this project?
13. Which year was the project? What do you wish to have known that you didn't know back then?
14. What are the other knowledge, skills or attitude which were not used in the above project but you used in other Web Based Instruction projects you led?
15. Assuming you are hiring a person as a beginning instructional designer in Web Based Instruction, what skills are you expecting?
16. Assuming you are hiring a person as an experienced instructional designer in Web Based Instruction, what skills are you expecting?
17. Which direction do you see Web Based Instruction is heading to?
18. What do you think an instructional designer should do in order to keep up with this direction?
19. Anything else that was not covered in our conversation but you think is important?

APPENDIX C NOTICE OF EXPEDITED APPROVAL

**WAYNE STATE
UNIVERSITY**

IRB Administration Office
87 East Canfield, Second Floor
Detroit, Michigan 48201
Phone: (313) 577-1628
FAX: (313) 993-7122
<http://irb.wayne.edu>

NOTICE OF EXPEDITED APPROVAL

To: Yonghui Chen
Administration & Organization S&D

From: Dr. Scott Mills *S. Mills*
Chairperson, Behavioral Institutional Review Board (B3)

Date: November 17, 2011

RE: IRB #: 064309B3E(R)
Protocol Title: Competencies of Expert Web-Based Instruction Designers
Funding Source:
Protocol #: 1111010288

Expiration Date: November 16, 2012

Risk Level / Category: Research not involving greater than minimal risk

The above-referenced protocol and items listed below (if applicable) were **APPROVED** following *Expedited Review* Category (#7)* by the Chairperson/designee for the Wayne State University Institutional Review Board (B3) for the period of 11/17/2011 through 11/16/2012. This approval does not replace any departmental or other approvals that may be required.

- Revised Protocol Summary Form (received in the IRB Office 11/15/2011)
- Protocol (received in the IRB Office 10/21/2011)
- Behavioral Research Informed Consent for Online Survey (dated 09/30/2011)

- Federal regulations require that all research be reviewed at least annually. You may receive a "Continuation Renewal Reminder" approximately two months prior to the expiration date; however, it is the Principal Investigator's responsibility to obtain review and continued approval **before** the expiration date. Data collected during a period of lapsed approval is unapproved research and can never be reported or published as research data.
- All changes or amendments to the above-referenced protocol require review and approval by the IRB **BEFORE** implementation.
- Adverse Reactions/Unexpected Events (AR/UE) must be submitted on the appropriate form within the timeframe specified in the IRB Administration Office Policy (<http://www.irb.wayne.edu/policies-human-research.php>).

NOTE:

1. Upon notification of an impending regulatory site visit, hold notification, and/or external audit the IRB Administration Office must be contacted immediately.
2. Forms should be downloaded from the IRB website at each use.

*Based on the Expedited Review List, revised November 1998

APPENDIX D [BEHAVIORAL] RESEARCH INFORMED CONSENT

Title of Study: Competencies of Expert Web-Based Instruction Designers

Principal Investigator (PI): Yonghui Chen
Instructional Technology, Education, WSU
248-935-7946

Purpose

You are being asked to be in a research study of identifying the competencies possessed by expert Web Based Instruction designers because you have met the five criteria and agreed to voluntarily participate in the study. This study is being conducted at a non-secured location mutually agreed upon by the participant and the principal investigator. The estimated number of study participants for the interview is about 15 as well as about another 30 for the online survey throughout U.S.A. This consent form is for the interview. **Please read this form and ask any questions you may have before agreeing to be in the study.**

In this research study, the researcher is to identify and rate the competencies for expert instructional designers who specialize in WBI. It is one of the hopes of this study to identify the relationships between a top quality Web-based instructional product and the high-level knowledge, skills and attitudes required to produce such a product.

Study Procedures

If you agree to take part in this research study, you will be asked to participate in one, approximately one-hour structured interview. This interview can happen face-to-face or via the web platform as you select. During this interview, you will be asked questions concerning your instructional skills and experience. With your permission, the interview will be audio recorded in digital. The recordings will be transcribed and recorded files and transcriptions will be securely stored until analysis is completed, at which time both recordings and transcriptions will be destroyed.

1. The process started with emails or phone calls to answer any of your questions or concerns. Once the eligibility and volunteering have been established, the contacts (by either email or phone call) has been undertaken to determine a convenience location, time and platform. You should have received the structured interview questions in email before the interview, to allow preparation and thinking.
2. The interview visit will last about one hour, in one session. If this one session has to be broken up due to emergency or other urgent needs, another interview session will be discussed and determined by both parties, until all of the

interview questions are answered. A follow-up contact is little likely, but not impossible, to clarify some answers of yours in the interview.

3. Some demographic questions will be asked. The majority questions are about the experience in your Web Based Instruction field. You may choose not to answer some of the questions if you don't feel comfortable and still be able to remain in the study.
4. Your identify will be protected, without releasing your participation to any other individuals or organizations. A pseudo name or code will be used to identify you in the study.

Benefits

As a participant in this research study, there *will* be no direct benefit for you; however, information from this study may benefit other people now or in the future.

Risks

There are no known risks at this time to participation in this study.

Alternatives

There is no treatment or invention in this study.

Study Costs

- Participation in this study will be of no cost to you.
- You will be paying gas yourself to the interview location, when necessary.

Compensation

You will not be paid for taking part in this study.

Confidentiality

All information collected about you during the course of this study will be kept confidential to the extent permitted by law. You will be identified in the research records by a code name or number. Information that identifies you personally will not be released without your written permission. However, the study sponsor, the Institutional Review Board (IRB) at Wayne State University, or federal agencies with appropriate regulatory oversight [e.g., Food and Drug Administration (FDA), Office for Human Research Protections (OHRP), Office of Civil Rights (OCR), etc.] may review your records.

When the results of this research are published or discussed in conferences, no information will be included that would reveal your identity.

The audio recordings of you will be used only for this research. After the study is completed, those digital recordings, transcriptions and any other documents directly related with you will be destroyed. You have the right to review the recording and transcriptions before the destroying action. The principal investigator (i.e. the interview conductor) is the only one who will have access to the identifiable information. Your personal identity will not be mentioned by the principal investigator during the recording, and you are asked not to mention full names of yours, your employer and other individuals, because the recordings may be sent to professionals for transcription.

Voluntary Participation/Withdrawal

Taking part in this study is voluntary. You have the right to choose not to take part in this study. If you decide to take part in the study you can later change your mind and withdraw from the study.] You are free to only answer questions that you want to answer. You are free to withdraw from participation in this study at any time. Your decisions will not change any present or future relationship with Wayne State University or its affiliates, or other services you are entitled to receive.

The PI may stop your participation in this study without your consent. The PI will make the decision and let you know if it is not possible for you to continue. The decision that is made is to protect your health and safety, or because you did not follow the instructions to take part in the study

Questions

If you have any questions about this study now or in the future, you may contact Yonghui Chen or one of her research advisors at the following phone number 248-935-7946 or 313-577-1728. If you have questions or concerns about your rights as a research participant, the Chair of the Institutional Review Board can be contacted at (313) 577-1628. If you are unable to contact the research staff, or if you want to talk to someone other than the research staff, you may also call (313) 577-1628 to ask questions or voice concerns or complaints.

Consent to Participate in a Research Study

To voluntarily agree to take part in this study, you must sign on the line below. If you choose to take part in this study you may withdraw at any time. You are not giving up any of your legal rights by signing this form. Your signature below indicates that you have read, or had read to you, this entire consent form, including the risks and benefits, and have had all of your questions answered. You will be given a copy of this consent form.

Signature of participant /

Date

Printed name of participant /

Time

Signature of person obtaining consent

Date

Printed name of person obtaining consent

Time

APPENDIX E [BEHAVIORAL] RESEARCH INFORMED CONSENT

Title of Study: Competencies of Expert Web-Based Instruction Designers

Principal Investigator (PI): Yonghui Chen
Instructional Technology, Education, WSU
248-935-7946

Purpose

You are being asked to be in a research study of scaling the competencies possessed by expert Web Based Instruction designers because you have met the five criteria and agreed to voluntarily participate in the study. The estimated number of study participants for the interview is about 15 and about 30 for the online survey. This information sheet is for the online survey. **Please read this form and ask any questions you may have before agreeing to be in the study.**

In this research study, the researcher is to identify and rate the competencies for expert instructional designers who specialize in WBI. It is one of the hopes of this study to identify the relationships between a top quality Web-based instructional product and the high-level knowledge, skills and attitudes required to produce such a product.

Study Procedures

If you take part in the study, you will be asked with questions concerning your opinions on instructional competencies. The survey will be anonymous, unless you are willingly to give your names and other personal information. The list of survey participants will be stored securely until analysis is completed, at which time the list will be destroyed.

- You will be asked to rate the importance and frequency of each listed competencies. Those competencies have been compiled out of the preceding interview results.
- You are encouraged to answer all questions. However, you the option of not answering some of the questions and remaining in the study.
- It will take approximately 15 minutes to complete the survey.

Benefits

As a participant in this research study, there *will* be no direct benefit for you; however, information from this study may benefit other people and society now or in the future.

Risks

There are no known risks at this time to participation in this study.

Study Costs

- Participation in this study will be of no cost to you.

Compensation

You will not be paid for taking part in this study.

Confidentiality

All information collected about you during the course of this study will be kept confidential to the extent permitted by law. You will be identified in the research records by a code name or number. Information that identifies you personally will not be released without your written permission. However, the study sponsor, the Institutional Review Board (IRB) at Wayne State University, or federal agencies with appropriate regulatory oversight [e.g., Food and Drug Administration (FDA), Office for Human Research Protections (OHRP), Office of Civil Rights (OCR), etc.] may review your records.

When the results of this research are published or discussed in conferences, no information will be included that would reveal your identity.

You will be identified in the research records by a code name or number, if you choose to identify yourself during the survey.

Voluntary Participation/Withdrawal

Taking part in this study is voluntary. You have the right to choose not to take part in this study. If you decide to take part in the study you can later change your mind and withdraw from the study. You are free to only answer questions that you want to answer. You are free to withdraw from participation in this study at any time. Your decisions will not change any present or future relationship with Wayne State University or its affiliates, or other services you are entitled to receive.

The PI may stop your participation in this study without your consent. The PI will make the decision and let you know if it is not possible for you to continue. The decision that is made is to protect your health and safety, or because you did not follow the instructions to take part in the study

Questions

If you have any questions about this study now or in the future, you may contact Yonghui Chen or one of her research advisors at the following phone number 248-935-7946 or 313-577- 1700. If you have questions or concerns about your rights as a research participant, the Chair of the Human Investigation Committee can be contacted at (313) 577-1628. If you are unable to contact the research staff, or if you want to talk to someone other than the research staff, you may also call (313) 577-1628 to ask questions or voice concerns or complaints.

Consent to Participate in a Research Study

To voluntarily agree to take part in this study, you must sign on the line below. If you choose to take part in this study you may withdraw at any time. You are not giving up any of your legal rights by signing this form. Your signature below indicates that you have read, or had read to you, this entire consent form, including the risks and benefits, and have had all of your questions answered. You will be given a copy of this consent form.

Signature of participant

Date

Printed name of participant

Time

Signature of person obtaining consent

Date

Printed name of person obtaining consent

Time

1 **APPENDIX F INTERVIEW TRANSCRIPTIONS**

2 **Transcription of Interview 001**

- 3 Q1 Good Evening, thanks for taking time with me. Can you tell me your current
4 job title?
- 5 A1 Principal instructional designer
- 6 Q2 How long have you been working in the current position?
- 7 A2 As the principal, two years. Before that, I had been instructional designer for
8 19 years.
- 9 Q3 What's your age range: 25-35, 36-45, 46-55, and 56 above?
- 10 A3 36-45
- 11 Q4 Would you say you are actively involved in instructional design?
- 12 A4 Yes
- 13 Q5 Are there any other positions have you held before, that were related with
14 instructional design?
- 15 A5 I was a senior instructional designer and a senior trainer before that
- 16 Q6 How many years accumulatively do you estimate you have worked in
17 design/development for WBI?
- 18 A6 I do both Web and instructor led so the combination of that is 19 years ...wait
19 let me think, web based probably didn't become popular... We were doing
20 computer based learning from hard drive from CD up till probably '99 so
21 web-based is probably from 2000 on. So about 11 years.
- 22 Q7 In those WBI projects, how many years accumulatively do you estimate have
23 served as a lead instruction designer/developer?
- 24 A7 I have been lead probably for I would say maybe six years.
- 25 Q8a What's the major of your bachelor's degree
- 26 A8a My bachelor's degree was in applied psychology.
- 27 Q8b Did you have postgraduate education: Master's, or Ph.D.?
- 28 A8b My Master's degree was in industrial organizational psychology, everything
29 else I learned on the job.
- 30 Q8c Have you had any other training on instructional design?
- 31 A8c No
- 32 Q9 What's the business nature of your current organization: business/industry,
33 education, government/military, health care, independent, other?
- 34 A9 Government
- 35 Q10 What's the estimated size of the organization you are working for?
- 36 A10 Probably 20,000 people, one of the big government contractors
- 37 Q11 Can you tell me a Web Based Instruction project you are very proud of or got
38 highly recognized?
- 39 A11 We did a project to teach the military personnel about the culture, what is the
40 cultural in Afghanistan where is the culture in Iraq and we ran a Brandon Hall
41 work for it. It was in 2006 I guess 2005, 2006.
- 42 Q11a How many team members in the project?
- 43 A11a There were four instructional designers, probably three graphic artists, a
44 couple programmers, a couple of QA people.

- 45 Q11b How long did it last?
- 46 A11b About a year and a half I guess
- 47 Q11c What was the project about, was it about how to complete a step, process, use
48 systems, or how to perform physical jobs, or change attitude/value?
- 49 A11c It was about culture in Afghanistan. It taught them about... It prepared the
50 military members before they went into the country, about things to expect,
51 things to do, not to do, about the differences between American culture and
52 the culture there, about their religion, about the food, things like that. That
53 was the nature of the content. That was a lot knowledge based.
- 54 Q11di Describe the project in a very high level (the process by stages)
- 55 A11di For that particular project, the client had already done the front end work and
56 they already had done the needs analysis and the contract .They gave us the
57 plan essentially for what they wanted, so we were just their
58 developers/designers. We developed the meeting plan that included the
59 learning objectives, the instructional strategies, uh... the interface design.
60 uh... the testing strategy. They did not have any test for that, they did not
61 want to test people on that. They just wanted them to get information. So
62 after the instructional design plan was approved, then we moved in to
63 production or storyboarding, developing storyboard then they went through
64 QA. We had an in-house tool we used for storyboarding that streamlined the
65 process... Once it's down in our storyboard tool, there was a lot programming
66 that had to be done by the programmers. They created the media, after that the
67 graphics, audios, the animation, that sort of thing. Then goes through QA
68 again, goes through the client. We do revisions and delivered. That's pretty
69 high-level.
- 70 Q11dii Describe the project in as much low level (steps, tasks) as possible
- 71 A11dii For the instructional media and design plan we...there were... each...this
72 particular client had a very specific format they wanted in, they have
73 certificate requirements and in the report so we follow the plan they provided,
74 the information they wanted which included developing a static prototype
75 which was just about how the interface was going to look like, what function
76 that involved working with the graphic artist team, and the designers came up
77 with a plan - the interface, the strategy, and provided the client an idea of how
78 the interface is going to look but not really the functionality because we did a
79 static prototype first then then we did a functionality prototype, which was a
80 lot cheaper than to produce to get all levels to buy in and then have them
81 didn't, not like it. So we did a static prototype which provided a terminal
82 learning objectives which were high-level objectives, then enabling learning
83 objectives which were the core. In that particular case that was all knowledge
84 base includes writing the standards and the score of completion, that was 80
85 percent of the test would be the standards of the completion. We typically
86 developed one module one step at a time because you wanted to deliver it and
87 got buy-in from the client before you moved onto the next. How many
88 modules in that one? I believe there were nine modules, each one has two or
89 three maybe four lessons. We wrote the storyboards and delivered the
90 storyboards. Then we might deliver in chucks, like two modules at a time so

- 91 the client is reviewing while we're working on the next set. That particular
 92 client, each client is different, we try to tailor our process to their needs and
 93 what their schedule is. That's something that the project manager does upfront,
 94 to look at it, to schedule the delivery, and what they want, and build up the
 95 process that will help us achieve the goal, the appropriate process, etc. For that
 96 project, we had two SMEs. They would answer the question if we had for
 97 them, we had to do a lot of research on ourselves they did not provide a lot of
 98 information. We had to go to the books and references. They had some
 99 materials from an instructor led course they used to offer. They did not offer a
 100 lot or better expertise. That was general information anyway, not job specific.
 101 You can get them from Internet, libraries, about different cultures, about
 102 aspects from UN. It was a lot of research. They were not real thrilled on that
 103 project because the course was replacing job or at least part of their job they
 104 taught, several courses, one of courses was being converted to web-based
 105 courses, so they were not terribly helpful.
- 106 Q11diii What event/communication marked with beginning the project?
 107 A11diii Usually, for that particular project, we received a statement of work and they
 108 had people sit on that. We offered how we would do it and how much money
 109 we would do it. They chose the contractor. So that was the statement of work.
 110 We were bidding for that project, and that was the project manager's job. I
 111 was not in the meeting. Now I am sometimes writing proposals, back then I
 112 was not.
- 113 Q11div What event/communication indicated the completion of the project?
 114 A11div I guess we call it validation. We went out and delivered it or we had a group
 115 of target audience took the class, the courses. They provided feedback. Based
 116 on the feedback, we delivered revised version. And then we delivered the final
 117 version of the courses in DVD to the client, the client implemented it to their
 118 intranet.
- 119 Q11dv What was your role in the project?
 120 A11dv I was an instructional designer, I developed the storyboard, and I helped to
 121 coordinate the production of the project and media. We did formative
 122 evaluation. We went to one of their sites and tried out on the target audience
 123 from the course beginning to the end. We collect the feedback as they go
 124 through: If they got hung up anywhere, if any problem they have. We write
 125 down their comments, how much time each lesson takes... We had them do
 126 level I evaluation: What do you like about it, if anything bothered you, that
 127 kind of thing. The client never came back for revision after the
 128 implementation.
- 129 Q11dvi What software and services were used?
 130 A11dvi We used an internal software tool that is proprietary. The output is HTML
 131 pages that anyone can edit including the client. It is called YYYYYY. It uses
 132 a database and we enter graphic instructions, audio instructions, other media
 133 instructions. That's where I used to create storyboard. It generated the courses
 134 we can use for production. The programmers and graphic artists can use those
 135 instructions for production and instructional designers can edit content
 136 without going through programmers. Flash was used for animation.

- 137 Q11dvii What hardware and devices were used?
 138 A11dvii Just PC.
- 139 Q11e What were the outstanding features of this project?
 140 A11e The interactivity. We created two levels of interactivity. The trainees would
 141 get a lot interactions that allows trainers to practice, interacting with
 142 characters, so to speak, of that culture where we gave them situations, and
 143 they gave choices based on what they learned. Then they will give feedback
 144 whether they insulted that person or that kind of thing. Every lesson has that
 145 interaction that allows them to practice, it's like a case study, sort of. It was
 146 visually good to look at. I like that project a lot because the content was
 147 interesting. A lot of projects I developed were pretty dull, that one was
 148 interesting content. In a way the interaction makes content more interesting.
 149 The content of the project was not broken down in any order. We do not
 150 require any particular course to be taken prior to other ones, they can take the
 151 courses in any order they want. There were lessons on religion, on food,
 152 restaurant, language, etc. They are not built on each other. They were just
 153 distinguishing.
- 154 Q11f Did it occur to you that you wish to have done the project differently?
 155 A11f If we had more budget, I probably would have done more the EOB based
 156 scenario or allowing the trainees to interact with... Like today we could use
 157 avatar - human state animation- to do it, they are very practical. They will
 158 come into existence, have more person to person interaction between the
 159 learners and the characters than the low level kind of still learning.
- 160 Q11g What were the solution(s) to the challenge(s)?
 161 A11g Not much challenge for that one. I have had much worse budget challenged
 162 projects. When we felt pushed by timeline, we put more people on it. We had
 163 a standardized template a working mode, so more people can work from it like
 164 worked by one person. That's our quality control standards -what styles, what
 165 this character does, what languages used, what word level you repeat to, K-12
 166 level, college-level, depending on the audience. So everybody works from the
 167 same plan and that's the internal documents. For that project, the learner
 168 characteristics were given, other projects we would have to do a full-term
 169 analysis and collect that kind of information specifically- what they age level,
 170 what their education level, work related information.
- 171 Q12a What specific knowledge, concepts, and ideas that helped you?
 172 A12a We used Bloom's taxonomy, Bloom's six levels of learning. We used that
 173 taxonomy to guide how we developed our learning objectives, the
 174 instructional strategies we used to teach depending on the level of the
 175 objectives.
- 176 Q12b What soft skills did you use?
 177 A12b Writing, attention to details, be able to work in a team because we need to
 178 interact with other instructional designers, artists, the programmers and media
 179 production staff. You'll be able to communicate with them clearly. We
 180 learned a lot that the way the graphic artists think is not the same with the way
 181 an instructional designer thinks. You write the instructions for the artist not
 182 for yourself. Dealing with clients was the project manager's job. He or she

- 183 knows when to raise a red flag, recognizing when there's a problem or
 184 potential problems. I think creativity, developing (writing storyboards),
 185 interacting, communicating are the essential soft skills. You have to be able
 186 to communicate with your SME, have to tailor to their style, because each
 187 SME is different, be able to interact with them the way that works for them,
 188 whether by e-mail or telephone and... We had a customer, they were working
 189 oversea, they could only call us in the evenings. It also will... know how to
 190 ask the right questions because sometimes they may know what they do so
 191 well that they don't think about the details, you have to be able to extract the
 192 details from them. That's the skills you have to develop because if we don't
 193 recognize that some things may be missing in the process, the SME is not
 194 going to recognize that because they were doing that so long they don't think
 195 about the details. Some SMEs we mentioned earlier on the cultural project
 196 were not very cooperative. They were not returning phone calls, they were
 197 not responding e-mails, we had to call and call until somebody got on the
 198 phone. At some point we had to go to the client, the one who was paying the
 199 bill and told them we're stuck here because we are not getting what we need.
 200 Can you help us? Can you intervene? You don't want create bad relationship
 201 with them but you have to go over the head to get what you need. Each one of
 202 them are very different. You have to work with them.
- 203 Q12c What hard skills did you use?
 204 A12c How to use computer, and our proprietary software.
- 205 Q12d What attitude did you realize that was helpful for the success of this project?
 206 A12d Patient, curiosity was good in terms of doing the research, a good attitude for
 207 people working in the military
- 208 Q13 Which year was the project? What do you wish to have known that you didn't
 209 know back then?
 210 A13 Started in the end of 2004. It ended in early 2006.
- 211 Q14 What are the other knowledge, skills or attitude which were not used in the
 212 above project but you used in other Web Based Instruction projects you led?
 213 A14 That was the project I learned a lot about working with graphic artists. I guess
 214 if I had known that back at that time, it would have made it a lot more
 215 efficient, streamlined. There was a lot of rewriting of graphic descriptions. I
 216 had to edit it over and over again because I hadn't been written it clearly for
 217 the artists.
- 218 Q11a Can you recall a project from which you learned the most? How many team
 219 members in the project?
 220 A11a More instructional designer, two technologists, a huge team of graphic artists
 221 probably 6 or 7 when it came down, one programmer, a project manager and
 222 a media production specialist and a team of quality control people. We had a
 223 document production team as well because for that particular project we
 224 produced real-life case material and PDF format, so we did that production on
 225 this case materials and put them in the PDF format. Probably 15 people.
- 226 Q11b How long did it last?
 227 A11b Almost 2 years from now. It started 2007 and was on hold for a year, we did a
 228 test then retesting 2007 and 2008, was on hold in 2009, we started the

- 229 production in early 2010. We just finished our formative trial and revision
 230 and we did the validation in January. It was a longtime project.
- 231 Q11c What was the project about, was it about how to complete a step, process, use
 232 systems, or how to perform physical jobs, or change attitude/value?
- 233 A11c A specific job for government agency so we had to do a full job analysis and
 234 task analysis to determine what they do on the job. We developed the training
 235 performance. It's very detailed training, testing validity reliability testing. It's
 236 about teaching the knowledge the skill and the process.
- 237 Q11di Describe the project in a very high level (the process by stages)
- 238 A11di Analysis and planning, design and development. I was a design lead for that
 239 project, I support the project manager. The project manager actually worried
 240 about the schedules and money. The design lead does everything else:
 241 coordinating the team of the production, make sure everybody's was on path,
 242 the standards of maintaining, that sort of thing, and evaluation.
 243 Implementation, we had a team to put everything in the server. Make sure
 244 everything went correctly. After implementation, anything happened after
 245 that goes to the maintenance team.
- 246 Q11dii Describe the project in as much low level (steps, tasks) as possible
- 247 A11dii From the beginning we did the job analysis, and we tried on the very small
 248 target audience. We did a small focus group. And then once we had the job
 249 done on the high level duties, the human performance technologist went out
 250 and get authorization in the field. They also did in the focus group in the field
 251 to determine the tasks with each of the job duty. Once the task analysis was
 252 complete, we passed it to the quality control and client review. Then we
 253 moved into design which includes instructional design report and learning
 254 analysis report which is the terminal learning objectives, the enabling learning
 255 objectives, the instructional strategies, the testing strategies, the static
 256 prototype. So we delivered the learning analysis, the instructional media
 257 design report, got feedback on that, did revision, then developed a functional
 258 prototype which is usually 10 to 15 screens that show our graphic user
 259 interface with the instructional strategies. We got feedback on that, got buy-in
 260 on that, and then our programmers built the back-end of the course using a
 261 template while we do the pre-design which is chunking the content we have,
 262 taking the tasks the task data from the task analysis, and put into what
 263 would've be in each storyboard, a set of storyboards, what we will put in the
 264 interaction... We don't call graphic design as pre-design, in pre-design was
 265 just chunking. Then we take them to SME, make sure we are understanding
 266 the content correctly, we are not missing anything, we are on the right path.
 267 Then we take the pre-design and put into the tool, the storyboarding tool
 268 where we create the graphic description and audio description the audio script
 269 animation description... Everything that appears on each page or interaction.
 270 That goes to quality control, we do a review with that to ensure the content
 271 was right, the validity. Then we delivered to the client, then we moved in the
 272 production work, concurrently the storyboards have been done, the testing
 273 team has been developing the tests that would go along with at the end of the
 274 lessons or modules, for this particular project, the test was at the lesson level.

- 275 Because the lessons were so large that we tried to test after lesson would be
 276 overwhelming if it is too far between tests. It could be a week between each
 277 test. It might end up with three-week long training. So, the tests were
 278 developed by human performance specialist while the designers developing
 279 the content, the storyboard. We also had to identify the cases. The case
 280 studies would support the exercises they will be getting because the
 281 interactive trainings where they had to actually use the real case studies
 282 performed the steps they wanted to on their job. So it's really development of
 283 case materials, so the three things were going along concurrently: the
 284 development of the case material, the development of tests, and the
 285 development of storyboards. Once the scoreboards were done and approved
 286 by the client, we went into production, the still graphics, the animation we
 287 used an Avatar mentor character in this particular project. So all production
 288 was going along simultaneously with the quality control cycle. The tests go
 289 through reliability and validity, but as instructional designer, I was not really
 290 involved in that, unless they need another body in the room. The whole focus
 291 group with SME review it and provided the feedback for reliability, with all
 292 the tests and the case material was done, the courses went through a series of
 293 trials formative evaluation. Trainees go through the trials and provided
 294 comments. They recorded their time data, did the level I evaluation, we
 295 implemented changes from the trials and then we go into the validation where
 296 novices go through the training and we have to get a certain number of them
 297 to pass the training, and test what they are supposed to, and train them as they
 298 were trained to. After validation was completed, any tests and revisions
 299 follow. Then we delivered to the client internal server, they did internal testing
 300 to make sure that it's functional and then it is complete.
- 301 Q11diii What event/communication marked the beginning of the project?
 302 A11diii They provided us a work order, we competed our contact, a five year-long
 303 contract. So they provided us the work order to develop the product. This is
 304 the client we worked with over and over again, they came to us and said we
 305 had this job, so go do it. Our project manager would involve in developing a
 306 plan, a schedule and then we go from there. We usually have a design
 307 kickoff. We also have production kickoff where we would include the artists
 308 the programmers for the interface design that sort of thing. And then would
 309 provide them directions based on the outcomes of the report we developed
 310 which the client signed off. We do have weekly project meeting basically just
 311 the design team, especially the front end, because really doing the early stages
 312 just the design and testing for the working graphics. Programmers are
 313 involved once... we do not really involve the graphic artist while we are
 314 storyboarding, we involved them in the back end once the storyboards were
 315 complete and approved, they started working on the graphics.
- 316 Q11div What event/communication indicated the completion of the project?
 317 A11div Implementation on their server. Once the testing was complete in their server
 318 and testing was successful - it can be accessed in the field, then it's considered
 319 complete.
- 320 Q11dv What was your role in the project?

- 321 A11dv I was a design lead and still am. So my job was to coordinate the design team,
 322 and the project manager. I work closely with the testing team lead, make sure
 323 that everything happens in the content also happens in the tests. I was
 324 responsible for making sure the production team for tasks and were writing a
 325 weekly status reports on the design functions, I also developed storyboard for
 326 two modules. I was responsible for putting together the design standards
 327 document and maintaining the design standards throughout the project. I was
 328 responsible for working with the instructional media designers. I was in the
 329 job analysis. I was not in the task analysis that was the job of human
 330 performance specialists. Although I had a degree on that, I do not enjoy that
 331 part, although my managers had asked me if I wanted to go back in. I stick to
 332 instruction and design, which I enjoy a lot.
- 333 Q11dvi What software and services were used?
- 334 A11dvi Same thing. We used an internal software. We also used Avatar software,
 335 myself I did not use it but our artists used it. That was new. I asked a lot of
 336 questions about the software what he can do what he cannot do. I don't know
 337 a lot about software. I don't know about HTML but I do recognize something
 338 small and I can correct it myself. We used a lot of templates so developing a
 339 templates up front so we'll can tell the graphic designer or artists and
 340 programmers what to do, so designing upfront requires knowing something
 341 about the software. I cannot tell you what software to use, but I know I must
 342 tell the dimensions, the graphics specs, whether it is opaque or transparent that
 343 kind of thing from the visual perspective. I don't know anything about
 344 Photoshop. We had a lot of job aids, a job aid library, with sample
 345 documents, sample templates, sample work. We have a SharePoint site,
 346 which was our central point for sharing communication or information.
- 347 Q11dvii What hardware and devices were used?
- 348 A11dvii Just PC
- 349 Q11e What were the outstanding features of this project?
- 350 A11e The use of an Avatar character in video, the size of it, very large and complex.
 351 That was completely online, that was the first project we had to complete the
 352 testing electronically. The other projects from the client used to be paper-
 353 based and the tests would be paper-based. We needed the test administrator,
 354 security for the tests all sort of things. The first one was completely online.
 355 The cases were electronic, the tests were performance-based and able to be
 356 captured electronically. It is very visually appealing.
- 357 Q11f Did it occur to you that you wish to have done the project differently?
- 358 A11f We ended up switching gear halfway, the original interface ended up not
 359 working with the Avatar and it wasn't visually appealing. So we started the
 360 production and went back. We re-did a lot templates with new graphics. We
 361 re-did screen by screen interface so it said better with Avatar, because the
 362 Avatar the key mentor was the key instructional strategy in this training.
 363 Because they're worth it, very small number of people doing the job. There
 364 were not a lot of experts in the field. They could not go to elsewhere for
 365 information for help, so we try to fill in the electronic mentor character so it
 366 was important to have the mentor be one of the central pieces, focus of the

- 367 course, I guess. We wasted a lot of time. We also had another lesson learned.
 368 We had a programmer who built a prototype, functional prototype outside our
 369 tool. When it came upon starting building in the tool, nothing was working
 370 correctly. So we had to have a different programmer who re-built all the
 371 templates. He was a new programmer...It was a mess. That all had to be
 372 fixed before we can continue.
- 373 Q11g What were the solution(s) to the challenge(s)?
 374 A11g To prevent that happen again, the managers had a big meeting about
 375 processes, establishing procedures and some documents in our repository, to
 376 try what thing had to be done upfront, what was supposed to be done. We had
 377 big project last year the size of the team was tripled in size of our team, there
 378 were a lot of new people, not everybody knew our production procedure, so
 379 everybody had to go through the repository, to know the production process,
 380 the workshops on it regularly, and so everybody got trained at the door.
- 381 Q12a What specific knowledge, concepts, and ideas that helped you?
 382 A12a Again we used Bloom's Taxonomy to determine the instructional strategies,
 383 and to task analysis, the values, the criticality, the frequency...
- 384 Q12b What soft skills did you use?
 385 A12b The same with the last project. The creativity, the communication skills, the
 386 organization skills, management skills because I had to manage a big team of
 387 people. To manage them, I had a very large spreadsheet, I tracked all the
 388 tasks that they had to accomplish every week, they had to go in to indicate
 389 what percentage of completion they had for each lessons of the topic, we also
 390 had regular meetings to report the problems, to process the status, so it was a
 391 lot of communication.
- 392 Q12c What hard skills did you use?
 393 A12c Same hard skill, writing and computer
- 394 Q12d What attitude did you realize that was helpful for the success of this project?
 395 A12d For this one, we needed patient because we had one subject matter expert, we
 396 had to wait our turn to get attention because she was also involved in the
 397 customer development, she was the one writing our case studies, she was one
 398 validating our content storyboard, answering questions so we had to be
 399 patient. There were some people having problem working with standards I
 400 guess, learning how to manage people to get them to do what you want them
 401 to do without making them feel they were being told what to do, it was an
 402 interesting challenge. I guess it was a management skill.
- 403 Q13 Which year was the project? What do you wish to have known that you didn't
 404 know back then?
 405 A13 The project was started 2007 and lasting till presently. I wish I had known
 406 more about the other part of production in the beginning, although I learned
 407 about in now, learning is always a good thing, new technologies and such. It
 408 was my first project with this particular client, so I learned a lot about that.
 409 Something I wish to have known where the challenges were, where the
 410 problems were. I learned a lot about internal production process for this major
 411 client

- 412 Q14 What are the other knowledge, skills or attitude which were not used in the
413 above project but you used in other Web Based Instruction projects you led?
- 414 A14 I think we should focus on the learning and not on the technology. A lot of
415 clients wanted to develop and not as concerned about the outcome, but I think
416 the training should be focused on that outcome, on things what can be done
417 not entertaining the processes. And I think it is important that we as
418 instructional designer to convey that.
- 419 Q15 Assuming you are hiring a person as a beginning instructional designer in
420 Web Based Instruction, what skills are you expecting?
- 421 A15 They had to be able to write well, to write learning objectives, they had to be
422 able to storyboard, and know what a complete storyboard is, not necessarily
423 use our tools, but they should know what a complete storyboard is, they
424 should understand instructional strategies, what different instructional
425 strategies that are available, and they should be able to take instructions from
426 others and implement in terms of being handed from media report or design
427 plan with some directions and be able to move forward with the project.
- 428 Q16 Assuming you are hiring a person as an experienced instructional designer in
429 Web Based Instruction, what skills are you expecting?
- 430 A16 In addition to all the things a junior does, I would expect that person to be able
431 to lead the project in terms of directing junior designers and preparing design
432 standards and design plan, be able to conduct focus groups, to lead the trials or
433 validation, to lead a team. Not necessarily managing, but be able to mentor
434 junior staff, to educate them to write the specs, the reports, or follow the right
435 process.
- 436 Q17 Which direction do you see Web Based Instruction is heading to?
- 437 A17 I heard a lot of social media for instructions, I'm struggling how knowledge
438 sharing can be used for instructions yet. It is true for instructional testing.
439 You can use the social media to convey the information but not necessarily
440 performance based instruction. I'm curious how we can integrate the social
441 media aspect to instruction without losing the integrity of the instruction itself.
442 I went to a lot of webinars on social media, but I want to see if it is working
443 before implementing any.
- 444 Q18 What do you think an instructional designer should do in order to keep up
445 with this direction?
- 446 A18 Several group out there such as is ASTD, ISPI offer meetings, online
447 materials, there were a lot of training, webinars, white paper that are out there
448 you can utilize, just make sure you keep reading to keep with what's going on.
449 I haven't been pushed a lot to get more education other than my job, although
450 we did white papers.
- 451 Q19 Anything else that was not covered in our conversation but you think is
452 important?
- 453 A19 Not I can think of now.
- 454 Q Well, that concludes our interview.

1

Transcription of Interview 002

- 2 Q1 Good Afternoon, thanks for taking time with me. Can you tell me your current
3 job title?
- 4 A1 We don't have a lot of formal titles here, but I guess it would be Lead
5 Instructional Designer, or Performance Consultant.
- 6 Q2 How long have you been working in the current position?
- 7 A2 Five years.
- 8 Q3 What's your age range: 25-35, 36-45, 46-55, and 56 above?
- 9 A3 56 and above.
- 10 Q4 Would you say you are actively involved in instructional design?
- 11 A4 Yes.
- 12 Q5 Are there any other positions have you held before, that were related with
13 instructional design?
- 14 A5 Yeah, I have been doing this for since about 1982. So yeah I spent many years
15 as a freelancer, when my kids were little. But I've also worked for a couple
16 other companies.
- 17 Q6 How many years accumulatively do you estimate you have worked in
18 design/development for WBI?
- 19 A6 Probably, I would say, 15 years.
- 20 Q7 In those WBI projects, how many years accumulatively do you estimate have
21 served as a lead instruction designer/developer?
- 22 A7 Probably all of them.
- 23 Q8a What's the major of your bachelor's degree
- 24 A8a Studio Art.
- 25 Q8b Did you have postgraduate education: Master's, or Ph.D.?
- 26 A8b I have a Master's in Studio Art.
- 27 Q8c Have you had any other training on instructional design?
- 28 A8c Well, other than taking a master's-level course in Instructional Media and
29 Writing, which was a long time ago. Other than that, all of my education has
30 been self-taught, learn-on-the-job. I've been sent to many seminars,
31 workshops, a lot of those over the year. So everything from technical writing,
32 documentation, to writing evaluation questions, to...I don't know, I don't
33 even remember all of them. I've gone to a lot of workshops throughout my
34 career. Yeah. And that's one thing that my boss does do. If there's a workshop
35 that's local, she will send us to those. So I've been to a lot, been several since
36 the past few years.
- 37 Q9 What's the business nature of your current organization: business/industry,
38 education, government/military, health care, independent, other?
- 39 A9 I guess we are categorized as business, services, or business consulting, or
40 something like that.
- 41 Q10 What's the estimated size of the organization you are working for?
- 42 A10 We have 12 people. It's 12 employees, but we also have a larger group of
43 freelancers that we work with. So we are sort of scalable. We have a big data
44 base. We probably have somewhere, I don't know, between 30 and 50

- 45 freelancers. Number that are working is given at a certain time may be, I don't
46 know, 10 or 15.
- 47 Q11 Can you tell me a Web Based Instruction project you are very proud of or got
48 highly recognized?
- 49 A11 Yes, I do have one in mind...Okay um the project was called...the real name
50 of it was YYYYYY and the course was designed toward one of our clients,
51 often scientific, and they manufacture medical devices and the course was for
52 their internal quality auditors to go around to different locations, sites within
53 the company and make sure that the sites are following compliance with
54 quality procedures and systems, most of which are mandated by the federal
55 governments. So this course was to help teach auditors the process by which
56 they would be effective and become excellent auditors when they perform
57 these audits. Yes, the very high-level mental skill, so it was teaching them...a
58 combination of teaching them the processes, procedures, and how they would
59 internalize those processes and their own knowledge and experience to
60 execute the audits at a very skillful level. So yes you call it a skill-based
61 course, you know, and its basic and it also involved a lot of the information
62 and abstract concept.
- 63 Q11a How many team members in the project?
- 64 A11a On our side, uh, YYYYYY side of the company I worked for, there was
65 project manager, me the instructional designer, a programmer, and a graphic
66 designer. On the client side, there was also a project manager, and a subject
67 matter expert. The subject matter expert was also the reviewer, although there
68 was his boss also who provided review. On a day-to-day basis, probably, in
69 this case, we interacted equally with the subject matter expert and the
70 manager, the project manager...because this content for this course was so
71 complex, the subject matter expert had to play a big role, I mean it was just
72 like interview at once and then I went off to the course. He was integrally
73 involved all the way along the course in developing the content and
74 instructional strategies and practice exercises and that kind of thing. The
75 project manager was also highly involved because she was also... had a lot of
76 instructional design experience, so she worked with both of us to develop the
77 content. So it's really a team in that way.
- 78 Q11b How long did it last?
- 79 A11b Well, it was a very, uh, I'm not sure I can give you a time, the actual time that
80 the design and development took to actually do the work. I can tell you the
81 last time this was actually took over the course over a year from start to finish.
82 I think it was about 14 months but a lot of that was due to the fact that our
83 subject matter expert was often unavailable because he was off doing audits.
84 So he could not meet with us or he didn't have time to review material until he
85 got back to his staff. So that was part of the reason it took so long. This was
86 2009. The bulk of the work was done in 2009.
- 87 Q11c What was the project about, was it about how to complete a step, process, use
88 systems, or how to perform physical jobs, or change attitude/value?
- 89 A11c It was about skill, process and knowledge.
- 90 Q11di Describe the project in a very high level (the process by stages)

91 A11di OK. Well, we started out our process here at the YYYYYYYY. It's pretty
 92 much the same for every eLearning project. We start out with a research and
 93 analysis step, and we move to design, to development. The link of the
 94 development is really a couple of stages within that. There is the instructional
 95 development—what I do is design the course—and storyboard, and then I turn
 96 it over to the programmer and graphic designer. And the graphic person
 97 obviously developed the graphics, and the programmer programs from my
 98 storyboard, and then inserts the graphics. We have an extensive review
 99 process built in both at the design stage and the reviewer... The client
 100 reviewer reviews the design before we have the development. During the
 101 development, we have a review of the storyboard by the client. They usually
 102 get one time to review the course, we make revisions, and they get a second
 103 chance to review the course. And generally we are done. Although this case
 104 we had more review cycles just because it was so complex, after that, it goes
 105 into testing. We tested it here, and then we tested it here, we tested it on the
 106 client site, on their learning management system, and they have their own,
 107 after we approve it, they have their own viewer testing and acceptance
 108 procedures, And once everything is good, pretty much the project we turn it
 109 over to them and they take it from them. We build in a level-2 evaluation into
 110 our courses typically. There is typically a knowledge assessment at the end of
 111 every course, which we build, and on the client side, they are able to collect
 112 through their learning management system and are able to collect the results
 113 of any individual learner's task. And they usually have an 80% pass-fail
 114 range. And our Level 2 evaluations can be very simple from, you know, ten
 115 questions of multiple-choice and true-false, up to things more complex, like in
 116 this case we built actually a pool of questions based on learning objectives, I
 117 think it was something like 30 or 40 questions in the pool. And then the
 118 programmer built the logic so that for every objective, I think each task was
 119 maybe 15 questions and it was built so that at least one question for ever
 120 learning objective is presented each time that learner took the evaluation. Now
 121 our clients typically have their own Level 1 evaluation, and they administer
 122 automatically at the end of every eLearning course. We usually don't create
 123 that here because they have their standard ones. As far as Level 3 and Level 4,
 124 we often, I would say, typically are not up to our clients to do anything at
 125 Level 3 or Level 4. So I mean occasionally it happens, but typically and
 126 especially with eLearning, they are not interested in taking the time and effort
 127 to do that. So any kind of Level 3 or 4 data collection is done anecdotally.
 128 And in fact we did collect some for this particular course because we gave a
 129 presentation on it at an ISPI meeting. And we were able to collect some
 130 anecdotal evidence that the learning could be applied to the job and it did have
 131 a positive effect on corporate goals. Typically when it's done it's done, and
 132 throughout the user testing and our testing, their testing, we identified any
 133 errors or bugs or any other problems like that. Any content problems have
 134 been identified and corrected at that point. So typically we are done. No
 135 revision after implementation. The only time that we may revisit a course like
 136 that was if the client comes back to us at a later date and says that "You know,

137 our process has changed and we want you to revise this course”. And then we
 138 really consider it as a new project, even though we may keep the basic course,
 139 we still consider it as a new kind of development project.

140 Q11dii Describe the project in as much low level (steps, tasks) as possible
 141 A11dii Well, let’s see. Typically, the research-analysis phase, I will gather first any
 142 documentation, and then the client can provide, and then I can review it and
 143 start to understand the concepts. Then we will have a meeting or a series of
 144 meetings with the client and the subject matter experts so that I can talk to
 145 them about, first of all, what I understand and don’t understand about the
 146 content, and then also have them talk about what they think needs to be taught
 147 and what their learners need to understand, you know, what should be
 148 emphasized and what’s not important. And that’s typically difficult with
 149 subject matter expert because they think it’s equally important and that
 150 everything should be taught. I pretty much gather information and then my
 151 next step would be to sift through that information that they have provided and
 152 try to determine what is really important instructionally. One thing we actually
 153 don’t do but should be doing according to the proper procedure is we do not
 154 usually do a task analysis, because again our clients typically don’t wanna pay
 155 for that because they usually come to us with an idea already in mind of what
 156 needs to be taught. So we did usually have to rely just on the subject matter
 157 expert, observing you know real learners in their jobs and figuring out what
 158 they do. In this case, at some point along the way we were able to do some
 159 observation. Actually the project leader on the client side did some
 160 observation and took some copious notes and sent them to me. One thing to
 161 mention too was that the complicating factor in this case was particular client
 162 is located in Massachusetts, so it’s not like I can easily go and it’s a big deal to
 163 make a trip there. So we do as much as we can virtually as possible. So
 164 anyway, at the end of the analysis stage, I will, I think in this case I did write
 165 up a report of the analysis and some initial ideas and what the learning
 166 objectives should be and our instructional strategies should be. Don’t always
 167 do that at this stage but in this case we did. Next we move to the design phase.
 168 And in design we started a design document that we have a template design,
 169 and that document we use covers all the bases and designs. I wrote that up,
 170 wrote a draft of that, pass to the client for review, we met and we had a
 171 meeting to review the design and I gather their feedback, did a revision. I
 172 think in this course just because it’s so complex and the fact that the original
 173 directives of this course, the manager in charge of the auditing group changed
 174 over the course of time, that we went through several iterations of the designs
 175 more than what we would normally do. Our design document consists of some
 176 we call our up-front, scenario setting information like who is the audience,
 177 what are the goals of the course, what are the learning objectives of the
 178 course, what instructional strategies in general we would use, what evaluation
 179 strategies we will use and things like that. And then ends with a content
 180 outline, which is actually the bulk of the document, and the content outline
 181 outlines the lessons, the topics and in the course we have these covered. For
 182 each of those provides the instructional...the presentation and other

183 instructional strategies we are gonna be using for that topic, like , is it going to
184 be a simple presentation of checks and graphics, or is it a demonstration that's
185 gonna have a practice exercise, is it gonna have questions, that kind of thing.
186 And how long each segment will be, each topic will be will change, you
187 know, approximately how many screens, whether it will be using things like
188 pop-ups and other types of media, like audio and video, things like that. So
189 that's what's in our design document. So it's pretty detailed and meant to be
190 detailed enough so that when finally approved, we get to go ahead and
191 develop. I can write my storyboards fairly easily from that design. Yes. So we
192 have templates for our storyboards, um, actually, I should say for each course
193 that we're developing, we develop templates for different types of pages or
194 screens in the course. And we have the templates created in Microsoft Word.
195 And we actually put in the background of each Word page a picture of the
196 course interface because we... I forgot to mention this but at this point or just
197 before this point, we will also be developing a design prototype, which will be
198 the look and feel of the course, and a functional prototype, which will show
199 how the different main interactions will work in the course. So for the design
200 prototype, the graphic designer will take a picture of the course interface, and
201 that will be put into the Word storyboards. And then I, as the instructional
202 designer, will take these storyboards and actually place the content on the
203 picture of the interface. So I will know how much of real estate, screen real
204 estate I have for all the components I wanna present on a given page. And if
205 we have audio, which this course did not. But if it does, we will provide on
206 the storyboards the audio script that will accompany each page, even down to
207 putting in the cues, the cues if, you know, certain audios play only when
208 certain graphics and texts are displayed on the screen, then we put it on the
209 script. Well, the phases of the development are me writing the storyboards and
210 getting them approved, so typically I will write the storyboards and I will send
211 them off to the client for review, and they will identify any changes they want,
212 and we will have another meeting to go over their feedback. I will make
213 revisions and come up with a final set of the storyboards. Then I will turn
214 over...internally here we have what we call a "storyboard turn-over meeting,"
215 and I will meet with the graphic designer and the programmer, and they will
216 review, in advance of that meeting, also review the storyboards, and then we
217 will meet so that they can ask me questions about anything that I've specified
218 in the storyboards that they may not understand or if they think if, you know,
219 an interaction that I've specified is too complicated or it won't work or
220 whatever, they will help me and if we need to work out any changes, you
221 know, those kinds of things. We'll do that at that meeting. And then they will
222 take it away, and they will produce the media assets and the programming for
223 the pages of the course. If we need to have audio done if the course calls for
224 audio, we will typically use computer-generated audio for the first draft of the
225 course so that we are not investing money into professional voice-recording
226 until the client has approved of the content. So that will be done as part of the
227 programming. If there's anything like video or animations, we will try to have
228 at least a rough cut of those done for the first draft of the course so the client

229 can see what they may look like. But we have the final versions. So it's
 230 always a matter of balancing the time versus cost versus efficiency equation
 231 when we develop the first draft of the course. So typically then we will have a
 232 completed first draft version of the course, the program, and we will provide a
 233 link to our course to our client, so the course will actually be residing on our
 234 server, and they will use the link to view it. They will go through the course,
 235 we have a review tool, an automated review tool that they can link to from
 236 each page of the course so that they can enter their comments or changes in
 237 there. And then we give them a certain time to review, and they provide their
 238 feedback. I review their feedback in the review tool, and then anything that I
 239 don't understand I will meet with them about. So the client answer, typically
 240 they can be very unspecific about their feedback, saying like "I don't like this
 241 page", you know, something general like that. So I will have to meet with
 242 them to find out what about that page didn't you like, and what should be
 243 changed too and things like that. Then I will pass all of their comments to the
 244 programmer and the graphic designer if necessary. They will, and usually this
 245 entails me making very specific additional clarifying comments on the client's
 246 original comments, saying "Ok here's what you need to change on this page,"
 247 "Here's what has to be different," you know, even down to wording changes.
 248 So they will then take it from there, they will make their changes, I will check
 249 their changes to make sure they've done them right. Sometimes this cycle
 250 goes through two or three times until everything's been fixed to my
 251 satisfaction. And then we again send it out to the client for another review.
 252 They will give their...typically we only give them two reviews. At this point
 253 they will have their final review and give any last changes that they see. If
 254 there are any changes left we will make them, and at that point we will put
 255 in...we will have the professional audio recorded because we now have the
 256 content completely nailed down and approved by the client, so that we can
 257 then spend the money and get the professional voice to record the audio. And
 258 then any final other media that we need to include will be completed at that
 259 time. And then, the course is sent out to them, what we tested out internally
 260 and typically on their learning management system to make sure everything is
 261 functioning. And then we give them the go-ahead to do their internal testing
 262 for functionality type issues. If there are any more problems identified at that
 263 point, I really have very little to do with it, it goes back to the programmer to
 264 make any correction. And that's pretty much it.

265 Q11diii What event/communication marked the beginning of the project?
 266 A11diii We talked about after the client already contracted with us to do the project,
 267 so the first event would have been what we call a starter-work meeting. And
 268 that's when we meet with the client and, on the client side, we met with the
 269 project manager and the SME. On our side, it was me, the project manager
 270 here, and so we met with them to talk about the project, what's expected, the
 271 schedule, deliver, staff, that kind of thing

272 Q11div What event/communication indicated the completion of the project?
 273 A11div The ending event...let's see. The ending event was...I remember we talked
 274 about this because I remember saying we ended this when they accepted the

- 275 finished program and we turned it over to them. So it wasn't a specific event,
 276 it was more like, okay, everything is done and problems are fixed and it's
 277 ready to go. Yeah, through email, or phone.
- 278 Q11dv What was your role in the project?
 279 A11dv I did all the design, all the analysis design and development, you know, up till
 280 the point when it was turned over to the programmer. And then after
 281 programming was done, we talked about it last time, I had to review the
 282 program course and do a quality check on the course and make sure
 283 everything was the way it should be as far as content, and so as far as
 284 functionality. So and then, after that it was turned over to client to review,
 285 then I had to review their review comments, any changes they wanted, and
 286 then that involved meeting, probably more than one meeting, um, and then I
 287 have to relay the changes to our programmer. So that cycle went through a
 288 couple iterations before the course was done. Progress reporting was done by
 289 the project manager, so she...I relate to her. Usually what we do is I got a
 290 schedule I have to get each step done by, so she knows, project manager
 291 knows when I get it done, and she provides data and updates to the clients.
 292 Project manager does meetings scheduling. It depends on what it is. If it has to
 293 do with design and development of the content, I need to talk to the client
 294 about content issues and questions. Then I will be initiating that contact
 295 directly. Otherwise it's project manager's work.
- 296 Q11dvi What software and services were used?
 297 A11dvi Yeah we used Microsoft Word, primarily to do the design document, and the
 298 storyboards. And they used Excel for different things...if, you know,
 299 whatever we were doing works better with Excel. So basically, Microsoft
 300 applications. When it gets to the programming and graphics, that's different,
 301 obviously different softwares. They, in this case, used Flash to program and
 302 the graphing artist used Photoshop and Illustrator for the graphics. I don't
 303 think we have anything else in that project. Generally no programming and
 304 graphics for me.
- 305 Q11dvii What hardware and devices were used?
 306 A11dvii Well, I have a laptop. And that's where I do all of my work. And, you know,
 307 we have a complete system, local area network here at our office with servers
 308 that store all of our files. And all of us individually, no matter what our task is,
 309 use their laptop to do their work.
- 310 Q11e What were the outstanding features of this project?
 311 A11e I think it was the probably the level of interactivity in the course, the ability
 312 for the learner to create their own learning path through the course, being able
 313 to have a lot of resources available for reference, being able to do a lot of
 314 scenario-based exercises. So I think all of those together made me think this is
 315 an outstanding project. I really think, I guess...to add to what I was saying,
 316 the scenario-based learning, is that it's so relevant to the learner's job
 317 performance, so it's really performance-based. We talked to the client about
 318 the performance change as far as mainly anecdotal, because we did the
 319 presentation at an ISPI meeting about it, so I asked them to please come up
 320 with any kind of feedback on how the course affected performance, so it's

- 321 mostly anecdotal. We didn't have data per se, but there was definitely
 322 evidence that performance has been positively affected.
- 323 Q11f Did it occur to you that you wish to have done the project differently?
 324 A11f Oh yeah. I always wanted to do them differently. Well, I think we talked
 325 about it a little bit last time, I definitely would have wished that we could have
 326 done a performance analysis up front to full task, which we didn't do. I think
 327 if I could have observed and interviewed the learners, their jobs, and talked
 328 about what they needed, I think we could have saved a lot of time at the
 329 beginning. It was basically the clients prevented us from doing that. They
 330 didn't wanna do that. Because we started out and they thought they knew
 331 exactly what the course was gonna be, and as I told you last time, it changed a
 332 lot over the course because the client on the client side...the person who we
 333 contracted with, the learning group within that company, had thought she
 334 wanted one thing in the beginning and it was very cut and dry, at the end it
 335 was totally different. I probably would do some of the content differently than
 336 I did but now I'm not sure exactly how. There was a lot of content in this
 337 course, a lot of text, so it was heavily text-based, which I tried to just talk
 338 them out of, but the learners, the auditors like to read, and we left it as that.
 339 But I think there was too much text in it. So I might've liked to do it a
 340 different way.
- 341 Q11g What were the solution(s) to the challenge(s)?
 342 A11g Well not in this project. Those are things that I continuously try to work on
 343 with every new project. I may apply what I learned to future projects.
- 344 Q12a What specific knowledge, concepts, and ideas that helped you?
 345 A12a I think basically the good old ADDIE model and instructional design. We are
 346 very heavily invested here at our company in performance improvements, so
 347 human performance, technology concept. So I tried to improve everything that
 348 I do. Not always easy, especially when the clients think they already know
 349 what they want. Just being able to...this is more the skills, into the next
 350 question, but I'm very detail-oriented, and I'm very focused on how to
 351 translate technical information into something that's teachable, so that's
 352 particular skill that I think I have...have been doing for a long time. And just
 353 basic writing skills. Teaching skills, I think as far as being able to instruct a
 354 course that will give the learner the right activity so that they can transfer that
 355 knowledge into performance and skill. And I'm not sure I'm answering your
 356 question...Oh communication skills, definitely. Interviewing skills. That's
 357 another one, because having to get the information from the subject matter
 358 expert takes a lot of interviewing skills. Because you have to know what to
 359 ask them, and you need to know how to follow up when they answer your first
 360 question. A lot of times they don't understand what we, from an instructional
 361 viewpoint, think most subject matter experts are not savvy about instructional
 362 design. So you have to be able to interview them in a way that they can
 363 understand what you are getting at, what is needed, and what learners need,
 364 rather than just needing everything that they know. So that's a big part of what
 365 I do. There's lots of written material. So I guess there's another skill, because
 366 I have to read the documentation and figure out what's the most important

367 part of it for the instruction. So I do a lot of reading of a lot of material,
 368 getting first of all that speed and understanding the topic. So that takes a lot of
 369 effort and time, up front usually. And typically that's done with the reading
 370 material. So I usually try to go into the first meeting with some background
 371 knowledge. And I guess that's one of the things I like about my job—that I'm
 372 always learning about how to do new things. Well I definitely need time
 373 management skills, but I think anybody that's doing some kind of job,
 374 professional job, has gotta have some time management. I don't think that's
 375 particular to instructional design. Usually I'm going against a schedule, and I
 376 have a deadline, so if I didn't manage my time, we wouldn't have anything
 377 done. I usually have at least two projects going on at the same time. They
 378 wouldn't necessarily be both equally large, one might be big and one might be
 379 smaller. But yeah I usually have multiple things going on. So I do have to
 380 juggle and manage my time to get things done. Prioritization is up to me.
 381 Mostly to me. But again it's based on deadlines, you know, which one has to
 382 be done first. No conflicts in this case. We all got along very well. Now I've
 383 had many times in projects where I had to deal with a difficult client, so that
 384 does happen. Well, it's usually things like clients don't review materials when
 385 they are supposed to, you have to, you know, pull them through a review and
 386 then it takes twice as long. And then they decide later that even if they told
 387 you something is okay, that they decided later that it's not okay. And that
 388 might be because they didn't really look at it the first time and now that they
 389 are looking at it and decide that it has to be changed. Now there's always
 390 clients who basically don't trust venders and we are a vender to them. So they
 391 are always watching to see if we are doing something not right or we are
 392 trying to hide something over their eyes, so they don't trust us. So those are
 393 difficult clients. I wouldn't say that happened very often though. To handle
 394 those clients, well you just gotta be...you just have to keep an even
 395 disposition; you have to give them what they want. If they want you to show
 396 them every step you are doing because they don't trust that you can do it on
 397 your own, then you show them every step you are doing. We find that if we
 398 are responsive to clients and keep on giving them what they want that they
 399 eventually back off. There's a certain level of trust that eventually we earn.
 400 It's very important.

401 Q12b What soft skills did you use?

402 A12b (Answered above)

403 Q12c What hard skills did you use?

404 A12c Other than writing and computer skills, well, writing is a big umbrella for a lot
 405 of skills. So I don't know, you know, that includes outlining, writing style, the
 406 appropriate writing style for the application; it includes meeting to write an
 407 instructionally sound sentence, so there's a lot of things...that's probably 80%
 408 of what I do is writing. If a course is going to be either given to people who
 409 speak English as a second language, or it will be translated into another
 410 language, then that takes a different type of writing. There are things like, you
 411 know, not using slang, obviously, or American terms, or a lot of contractions,
 412 being very clear in draft, especially for people who speak English as a second

413 language. For translation, you know, the same things apply, but we also have
 414 to worry about screen real estate, because translation usually takes more word
 415 than English, and we have to make sure that we have enough space on our
 416 screen to accommodate the extra words. For cultural elements, well, we want
 417 to make sure we don't have American culture in what we write, so it has to be
 418 neutral. This is something that clients expect us to know, that we will usually
 419 talk to them about it if it's an element in the project, to make sure that we
 420 understand what they think we understand and what they expect. But I think
 421 they generally know, you know, expect us to know the basic concepts
 422 including the cultural element. So, yeah you definitely wanna use active verbs,
 423 keep the sentence active constructions, shortened draft.

424 Q12d What attitude did you realize that was helpful for the success of this project?

425 A12d I think keeping an open attitude to...and this is something I struggled a lot
 426 with this particular project, because of the changing a lot. So I had to keep on
 427 being open to the fact that they would change, and what I thought would be in
 428 this course now turned out to be something different. That's a little frustrating
 429 to me personally, because I'm the kind of person that likes to know what it is
 430 gonna be and then build it. So when they keep being squishy, and I keep
 431 having to change, that bothers me. So it was a threat to me. Maintaining
 432 interest in the content, that was helpful. I think that that's one of my strengths,
 433 because I do like learning about new things. And with every project I am
 434 learning about new things. So that keeps my interest in the project, that I
 435 realize I'm gonna learn something new by working on this project and it's not
 436 painful for me to work on it.

437 Q13 Which year was the project? What do you wish to have known that you didn't
 438 know back then?

439 A13 It was 2009. We finished it in 2010, but most of the work was done in 09. I
 440 just recently read, I don't know if you are familiar with this book, by Ruth
 441 Clark, the Merrill of instruction. You learn it in the science of instruction. I
 442 just finished reading their new edition. It's published and there were a lot of
 443 research-based principles about eLearning in that edition. I wish I had known
 444 back then. You know, knowing what works best for learners, whether how
 445 many words to use, whether to use audio versus text, when to use graphics,
 446 what kinds of graphics to use, when, where, how they should be placed in the
 447 screen, all that stuff. Which I knew to some extent at that time, but with the
 448 new research they presented in this edition, a lot of clear-cut guidelines are
 449 very helpful for anybody that's designing eLearning.

450 Q14 What are the other knowledge, skills or attitude which were not used in the
 451 above project but you used in other Web Based Instruction projects you led?

452 A14 Nope

453 Q15 Assuming you are hiring a person as a beginning instructional designer in
 454 Web Based Instruction, what skills are you expecting?

455 A15 I think they should have some grounding in instructional design theory and
 456 they should definitely have the same background in performance
 457 improvement. They should be detail-oriented, good writers, able to juggle
 458 different projects to some extent. Obviously, if it's a beginning person I

- 459 wouldn't expect them to be very experienced in all of that, but they should at
 460 least have some of those basics.
- 461 Q16 Assuming you are hiring a person as an experienced instructional designer in
 462 Web Based Instruction, what skills are you expecting?
- 463 A16 Probably the same thing, but I would also want to see that they have a lot of
 464 experience from creating instruction. And I'd like to be able to see what they
 465 have created. And know that they can exhibit those skills in the knowledge
 466 and concept. I'd like to see anything they can show me from different stages
 467 of the project. It can be difficult and I understand that. But typically people
 468 can bring out something, even if it stripes out the client information. They can
 469 certainly show things, maybe not the finished course, because that's usually
 470 the most difficult thing to show, but if they can do anything, show anything
 471 like storyboards or some sort of prototype or something that would show that
 472 they understand eLearning. A strong portfolio. Well, I guess I'll answer that in
 473 a reverse way. I would expect the beginner to...that I would have to do a lot
 474 of coaching on the job with them, because they may have the theoretical
 475 knowledge but not the experience with clients to do the client job. Theory is
 476 hardly ever, I mean, I should say, reality hardly ever plays out like theory says
 477 it should. So I would expect that they would know they need help getting
 478 through a project. And I would say, with an experienced person, I should give
 479 them the project and they should be able to take off with it on their own.
 480 Possibly able to lead others, although I don't think that's a big thing with
 481 instructional design. Unless you are gonna be a manager. Well, maybe leading
 482 multiple team member is the case in some places, but that's never the case in
 483 any place that I've worked. There is usually a project manager and I'm part of
 484 the team, or I'm working by myself on a project. A project without any other
 485 team members won't be typically a full-blown course because I couldn't do all
 486 of that by myself. But it could be a smaller thing. It could be something like
 487 performance support material sample. I expect people should at least know
 488 how to use Microsoft Word, and believe me there's a lot of people who don't
 489 know how to use it. It's really frustrating. And they should know all the
 490 basics, PowerPoint, Excel, Word.
- 491 Q17 Which direction do you see Web Based Instruction is heading to?
- 492 A17 Well, the big trend we are seeing is the move to mobile. And it may not be
 493 what we think of as traditional web-based instruction, it may be more
 494 applications, more information-based rather than traditional training, but I
 495 don't think web-based instruction is gonna go away. It will stay like
 496 classroom training is still gonna be around. But I think a lot of learning
 497 delivery is gonna happen more and more on mobile devices. And learning
 498 delivery can mean a wider range of solutions. Can be very informal.
- 499 Q18 What do you think an instructional designer should do in order to keep up
 500 with this direction?
- 501 A18 All that's the hard part. You have to be completely heeded into all of the news
 502 that's happening, and it's very hard to keep up with. I mean, I have a lot of art
 503 and feeds that I keep on my computer, and usually they are through different
 504 professional organizations, but just keeping up with all the literature that's on

505 the web now, it takes me...I mean, I'd like to spend at least an hour a day
 506 reading, to keep up with the new development. I don't know I have that much
 507 time, but it's something that I have to keep doing. If I don't, you know, the
 508 world is gonna pass me by. But I think any designer has to keep up with the
 509 latest developments in learning series as well as technology. I think especially
 510 when you are doing web-based delivery or any kind of electronic delivery of
 511 learning, you have to know what the latest technology is. Not to the level that
 512 a programmer might have to know it, but at least understand what it is and
 513 what it can do and cannot do. My manager is very supportive. In fact she
 514 encourages everybody to do that. I just wished that we have more time to do
 515 it. Between various professional groups, and the things they published, and
 516 blogs, and LinkedIn discussion boards, there's a lot to keep up with. I have
 517 not gone to an international conference in a long time mainly because the
 518 president, the CEO of our company who is my boss wants us to be a presenter
 519 at a meeting before we go, before she will pay for us to go, but I'm trying to
 520 change that. Because we did put in a speaker proposal for the ASTD
 521 conference this year and got rejected, so I'm not going. I'm now working with
 522 a colleague here to put in a speaker proposal for the mLearning conference,
 523 which is coming up in the spring. Hopefully we will get accepted. She
 524 typically does not just send us to go to conferences. I do a lot of local
 525 meetings though, ISPI meetings here and ASTD meetings. And also the third
 526 one is, the Society for Technical Communications, and I'm also a member of
 527 that. I don't go to every meeting but it's a good one. Yeah they are expensive.
 528 The international conferences are very expensive, especially when you add in,
 529 you know, airfare and hotel. If my boss would send me, she would pay for it.
 530 But because it's so expensive, that's why she doesn't send us very often.

531 Q19 Anything else that was not covered in our conversation but you think is
 532 important?

533 A19 I don't know, I can't think of anything. Your questions are very thorough.

1

Transcription of Interview 003

- 2 Q1 Good Afternoon, thanks for taking time with me. Can you tell me your current
3 job title?
- 4 A1 Manager of instructional development
- 5 Q2 How long have you been working in the current position?
- 6 A2 1 year and 3 months
- 7 Q3 What's your age range: 25-35, 36-45, 46-55, and 56 above?
- 8 A3 46-55
- 9 Q4 Would you say you are actively involved in instructional design?
- 10 A4 Yes
- 11 Q5 Are there any other positions have you held before, that were related with
12 instructional design?
- 13 A5 Yes, every positions in the past 20 years
- 14 Q6 How many years accumulatively do you estimate you have worked in
15 design/development for WBI?
- 16 A6 I would say 15 years
- 17 Q7 In those WBI projects, how many years accumulatively do you estimate have
18 served as a lead instruction designer/developer?
- 19 A7 11 years
- 20 Q8a What's the major of your bachelor's degree
- 21 A8a I have a bachelor in English and broadcast, it was double major
- 22 Q8b Did you have postgraduate education: Master's, or Ph.D.?
- 23 A8b I have a Master's in English literature as well
- 24 Q8c Have you had any other training on instructional design?
- 25 A8c Yes, professional consulting, 6 Disincline of grade school learning, that's like
26 two days training, I also have facilitator's training.
- 27 Q9 What's the business nature of your current organization: business/industry,
28 education, government/military, health care, independent, other?
- 29 A9 Business in construction
- 30 Q10 What's the estimated size of the organization you are working for?
- 31 A10 30,000 employees, it is a global
- 32 Q11 Can you tell me a Web Based Instruction project you are very proud of or got
33 highly recognized?
- 34 A11 It was a project for culture communications. It was delivered over webinar, so
35 virtual online learning, and it was to help people in the U.S. and people in
36 India better understand each other. It was about team building, team
37 communication, culture communications
- 38 Q11a How many team members in the project?
- 39 A11a Probably 6: myself, SME, a culture communication, a SABA Centra
40 technologist, a SABA facilitator, and another SME from India. Because it was
41 cross culture, just to make sure we were inclusive and were able to design the
42 training so to meet both audience's needs, to be culture appropriate
- 43 Q11b How long did it last?
- 44 A11b About four months

- 45 Q11c What was the project about, was it about how to complete a step, process, use
46 systems, or how to perform physical jobs, or change attitude/value?
47 A11c It is about value.
- 48 Q11di Describe the project in a very high level (the process by stages)
49 A11di This is a synchronous learning. We did needs assessment, to find out what the
50 audience needs were, what was driving the request for the training, to find the
51 right vendor to work with. It was for in-house training. We wanted to identify
52 the right vendor to work with, so we looked at some different Subject Matter
53 Experts. And as well we did the design, like high level design, course outline,
54 content outline, maybe an outline of PowerPoint, then we designed test
55 questions and assessment. For development, we worked with the graphic
56 designer to help us to design some graphics and interactions. Yes, we
57 designed level 1 evaluation, after that, we did practice runs, dry runs and pilot.
58 For implementation, setting up all the sessions, working with the technology
59 experts to test out the SABA Centra environment, preloaded everything into
60 the system, getting everybody scheduled to attend, making sure the pre-work
61 and invitations and got registered out on time, and we rolled out to different
62 session, we offered multiple sessions over the period of a few months. We
63 started capturing feedback.
- 64 Q11dii Describe the project in as much low level (steps, tasks) as possible
65 A11dii In the beginning, for the analysis, we had calls of some different vendors; read
66 some different books what were on culture commutations, we reviews a
67 course this particular vendor had already written for the classroom and
68 considered how we could transfer that to virtual environment. And then we
69 started coming out with the outline once we engaged the vendor, started
70 working on the content, designed some of the test questions, taking the
71 existing final exams and writing them for the web, getting them programmed
72 for the web. We held a series of meeting: we had a kick-off with the vendor,
73 and we had a series of team after that, working meetings to work on the
74 content together, and dry run to go through the PowerPoint, and practice
75 sessions working with the technology team for Centra to make sure we could
76 load into the system and practice using the system. We had the practice
77 session of how to use the virtual environment with the vendor, a series of
78 those, like how to ask questions, how to use whiteboard, how to use chat, how
79 to go to some vote place, the activities we designed. Then we published the
80 course, and did some practice with internal professionals, some already had
81 been working with India, or had been working with U.S., and got some
82 feedback from them and refined the course material after that. Then we
83 launched it and tracked the evaluation and we looked at the evaluation after
84 every course and did some enhancement so it is like a live continuously
85 improvement after feedback on every session.
- 86 Q11diii What event/communication marked the beginning of the project?
87 A11diii A kick off meeting with the vendor
- 88 Q11div What event/communication indicated the completion of the project?
89 A11div We had a celebration meeting, we talked about some of the results, we talked
90 about that some of the other departments had been inquiring the course and

- 91 wanted to roll out the course to their departments, we had the vendor
 92 connected with other departments and shared the results.
- 93 Q11dv What was your role in the project?
 94 A11dv Project manager, designer and developer. Which one was more? Probably
 95 designer. I wrote storyboard, I wrote test questions, I revised content, I made
 96 sure the instructional design met the different adult learning styles, made sure
 97 it worked in virtual environments, made sure it's highly interact, lots of
 98 activities, lots of role play, lots of knowledge checks throughout to keep the
 99 learners engaged. For management role, scheduled the meetings, worked with
 100 the vendor, worked with technology team for SABA to make sure the material
 101 were loaded properly, made sure the registration and invitation went out in a
 102 timely manner, collected the date from the assessment and shared with other
 103 team members. I did some budgeting, I always had to refer to the budget year
 104 to make sure the work group was doing within the budget. If I needed more I
 105 had to request it or borrow it from another area. And made sure the invoice
 106 went out, or to say the invoice was paid. For the developer's role, I developed
 107 some of the graphics, the charts, the PowerPoint that was loaded into the
 108 system, the final evaluation and knowledge check questions, the role plays
 109 even some of the graphics for the role plays.
- 110 Q11dvi What software and services were used?
 111 A11dvi PowerPoint, Word, Excel, SABA Centra (the development, implementation
 112 and delivery tool), Adobe Illustrator, Photoshop, Flash, Adobe Acrobat, Web
 113 access is very important because we recorded the virtual classes for those who
 114 missed them and some reading assignments accessed online. The classes were
 115 delivered at SABA Centra
- 116 Q11dvii What hardware and devices were used?
 117 A11dvii PC, headset, that's probably it
- 118 Q11e What were the outstanding features of this project?
 119 A11e The subject matter expert was well known at his field. Another thing about the
 120 SME is he spoke the language of the people who attended the course from
 121 India and he knew a lot about the culture, so that made him very ...they
 122 accepted him and they appreciated him. Respective I should say too they had
 123 for him. Another outstanding feature of it was the interaction virtually, like
 124 whiteboard, scenarios we created, they were very engaging. We had role play,
 125 we had students got involved in the role play, they worked through the role
 126 play during the session, and that was one of the troubles with virtual learning
 127 is making sure students are engaging and not multitasking. So we asked them
 128 a lot questions using white board tool; we got them to share some of the
 129 questions using text chat, and shared some of their stories. During the class,
 130 we talked about some of the reading chapters assigned outside the classroom.
 131 In summary, the excellent SME, the interaction with and among students and
 132 engaging them were the outstanding features of the project.
- 133 Q11f Did it occur to you that you wish to have done the project differently?
 134 A11f Yes, like the audience size. We had large audience from 20 to 100. I would
 135 have wanted to stick to smaller audience so it is easier to track their progress.

- 136 Because having 20 or 30 people responding in text chat, keeping up with that
 137 was very difficult.
- 138 Q11g What were the solution(s) to the challenge(s)?
 139 A11g We had two facilitators, the SME and myself, plus we had a technical support,
 140 so actually I did some deliverers as well. So I could keep track what was
 141 coming in the chat and reminded the facilitators and say, “Hi, did you see that
 142 comment?” and such and such. Help out as a team was our solution back time,
 143 I would have wished to schedule more smaller sessions, ideally. Another
 144 challenge was the time difference, about 13 hours, we had either to work
 145 either early in the morning or late at night. And part of our audience were also
 146 in the west coast, that complicated the Indian situation further. So the
 147 audience in three different time zones had to compromise. And we scheduled
 148 sessions at different time, trying to help that.
- 149 Q12a What specific knowledge, concepts, and ideas that helped you?
 150 A12a Studying about the virtual learning, how to keep audience engaged virtually,
 151 like what kind of activities, what frequency of activities, and just basic adult
 152 learning styles, for even like for self paced learning, some of the courses were
 153 recorded. And then of course just basic instructional design theories, like
 154 ADDIE model.
- 155 Q12b What soft skills did you use?
 156 A12b Communication skills, especially culture communication skills, project
 157 management, team building, problem solving and decision making. Hard
 158 decisions like whether or not to do a large format course or trying to break
 159 into smaller ones but spending more money, budging issues to around that so
 160 how frequent to offer the sessions, what to do when the enrollment was low,
 161 people didn’t show up for the class, what vendor to use.
- 162 Q12c What hard skills did you use?
 163 A12c Definitely PowerPoint, some graphic knowledge for presentation and
 164 storyboard, Excel using the Spreadsheets, for tracking and project
 165 management, using SABA as well. Have a high level of knowledge of LMS.
 166 For the designing part, knowing the process, ADDIE model. Understanding
 167 culture element is important too. We need to consider such as the way the
 168 graphics portrait, we had a team reviewing everything both at the US and
 169 India, so we are not missing anything near. And we decided in the beginning it
 170 was in our strategy that we are going to be forth right about things, instead of
 171 being beaten up by poor strategies, how can we improve culture
 172 communication if we do not talk about what’s happening. Researching on the
 173 subject helped as well, I read some books and did some research online.
 174 Having a SME being an expert, met the author who write about different
 175 cultures he also helped educating me.
- 176 Q12d What attitude did you realize that was helpful for the success of this project?
 177 A12d Being open minded, and positive. Because it was culture communication, you
 178 had to look past from the negative comments you heard from people your
 179 target audience, had to understanding why they took the course. And by
 180 having that background education and research advance I did, I got an
 181 understanding where the attitude came from. So my attitude was to help

- 182 people to get to the new point of understanding that the reason why they had it
 183 was because they didn't understand. We told them that by taking the course
 184 we hope you will have a new understanding and you will see things
 185 differently.
- 186 Q13 Which year was the project? What do you wish to have known that you didn't
 187 know back then?
- 188 A13 2009. I wish to know back then about something about the virtual learning
 189 environment in SABA. At that time the virtual synchronous learning was just
 190 really starting to take hold of a lot of companies, and there was not a lot
 191 information about it. So some of the research done earlier on how to involve
 192 your audience or too less tools tell you if someone was on task, some of things
 193 now you can text check finding out from exercises...some of that info become
 194 easier to find on the web and research.
- 195 Q14 What are the other knowledge, skills or attitude which were not used in the
 196 above project but you used in other Web Based Instruction projects you led?
- 197 A14 Can't think of anything off hand right now.
- 198 Q15 Assuming you are hiring a person as a beginning instructional designer in
 199 Web Based Instruction, what skills are you expecting?
- 200 A15 To understand, to be able to identify and apply ADDIE in instructional design,
 201 to be able to internal assessment, tying the initiative learning with business
 202 outcomes, to have a basic understanding software if necessary in this case is
 203 SABA and PowerPoint, in another case might Dreamweaver and HTML, to
 204 have some team skills, to show signs they can work on a team.
 205 Communication skills and writing skills should be essential.
- 206 Q16 Assuming you are hiring a person as an experienced instructional designer in
 207 Web Based Instruction, what skills are you expecting?
- 208 A16 I would expect consulting skills you know performance consulting skills, the
 209 ability to tell whether it is training need or business need to be addressed,
 210 front end analysis, of course the ADDIE model application, project
 211 management skills, everything from the first identified in addition to better
 212 communication skills, project management, maybe team facilitation not just
 213 being able in a team. And then probably more programming skills like better
 214 knowledge of the software and technology needed for development. I hate to
 215 say I expect more hard skill from the experts because it would be more likely I
 216 expect that from people in the middle. But if I answer the questions it is
 217 written, then yes more hard skills. And more a manager, or a leader of a team,
 218 probably not as many hard skills than soft skills. The project management
 219 skill is important so that they can get the project done, so they had experience
 220 with the tasks, what mistakes not to make again, what are some of the best
 221 practices, be able to lead the team to get the project done on time. And also be
 222 able to gain the support needed from the stakeholders to ensure the project
 223 successful and supported throughout.
- 224 Q17 Which direction do you see Web Based Instruction is heading to?
- 225 A17 Well, I hear a lot of people talking about, and it is pretty evident on the web as
 226 well, like HowTo, YouTube, that the general people start developing web
 227 instruction materials now. Like SMEs doing on their own and people relying

- 228 on that. Like myself before buying anything I go online and I read comments,
 229 postings and product reviews and such, so I see pretty much it is driven by the
 230 novices, developed by the novices. But for the formal learning like we do for
 231 school for business, I think we should be slow to keep up with that trend. I
 232 might use it, informal learning, as a support, but I don't see relying on that.
 233 There is nobody monitor it, nobody is looking at whether or not it is true
 234 instruction, how and if that person is an expert. Sometimes you don't know if
 235 you are learning when you are learning that way. I really not feel threatened to
 236 see instructions designed and developed by non professionals, maybe at a
 237 point I was, but I really don't because I think to get to a point where you can
 238 really design instruction to meet the learner's needs, you really need
 239 experience, and I don't think that piece is ever going away. The way we
 240 involve human race in the planet, the global economy, the learning is going to
 241 become more and more technical, just going to be at faster pace we need to
 242 learn, and it is becoming more difficult. So we are always going to need sound
 243 instruction designers, we are not going to rely on general public on everything
- 244 Q18 What do you think an instructional designer should do in order to keep up
 245 with this direction?
- 246 A18 I definitely keep in touch with former colleagues, I did a lot of readings, I
 247 sometimes attended seminars and meetings, I did a lot research on the web.
 248 Some general browsing, some just on the nature of the projects I am on,
 249 sometimes do a lot of benchmarking of vendors, like the top 125 learning
 250 initiatives every year award on training magazines, to see what other
 251 companies are doing. If you keep in touch with other companies are doing,
 252 gives you some ideas on the trend, gives you some ideas what sort of things
 253 you can do.
- 254 Q19 Anything else that was not covered in our conversation but you think is
 255 important?
- 256 A19 Yeah, LinkedIn is good, the social networking with LinkedIn, Facebook.
 257 More companies are getting on the web too, that gives you a chance to
 258 network professionally, and to join groups that are key in your interest areas.
 259 They no longer need to go to seminars at Orlando, you know you can just go
 260 to LinkedIn and join different HR or talent groups there in your focused
 261 interest areas, read their blogs, get involved with what's happening on the
 262 web, what's happening with social networking. I am in ISPI.
- 263 (This concluded this interview)

1

Transcription of Interview 004

- 2 Q1 Good Afternoon, thanks for taking time with me. Can you tell me your current
3 job title?
- 4 A1 I call myself an instructional designer
- 5 Q2 How long have you been working in the current position?
- 6 A2 Over 20 years
- 7 Q3 What's your age range: 25-35, 36-45, 46-55, and 56 above?
- 8 A3 I am over 56
- 9 Q4 Would you say you are actively involved in instructional design?
- 10 A4 Yes, I am still working. There are still projects on my desk
- 11 Q5 Are there any other positions have you held before, that were related with
12 instructional design?
- 13 A5 I was a computer programmer and I also taught computer programming in a
14 high school for 5 years. So I fell that my teaching coupled with programming
15 put me in a good position
- 16 Q6 How many years accumulatively do you estimate you have worked in
17 design/development for WBI?
- 18 A6 Probably over 10 years right from when I started and I got into it. Most of
19 time I was the lead person of those projects. Sometime there were other
20 people work with me and sometimes...I have an instruction designer work
21 with me and because my programming background, I do the programming for
22 web base development. Sometimes I do both of them. Sometimes they want
23 me to develop because they know that I know what can be done on the
24 internet...but I turn that to the programmer. So it is really from job to job.
- 25 Q7 In those WBI projects, how many years accumulatively do you estimate have
26 served as a lead instruction designer/developer?
- 27 A7 Oh, at least for 3 years, I have worked as a main designer/developer. Probably
28 have a lot more.
- 29 Q8a What's the major of your bachelor's degree
- 30 A8a My bachelor degree is computer science
- 31 Q8b Did you have postgraduate education: Master's, or Ph.D.?
- 32 A8b My master degree is Education and Instructional Technology
- 33 Q8c Have you had any other training on instructional design?
- 34 A8c No that is it. I don't have other certifications, sometimes I would take course
35 like I am learning Lectora, or might have online tutorial but I haven't gone
36 through any other...education per sa in the field. Those tutorial usually are
37 free.
- 38 Q9 What's the business nature of your current organization: business/industry,
39 education, government/military, health care, independent, other?
- 40 A9 I am self-employed. I work anywhere from automotive. I work for all of the
41 automotive companies in the area to museums and small companies or
42 corporations that might want something done. I always learn something new.
- 43 Q10 What's the estimated size of the organization you are working for?
- 44 A10 It is myself and whoever else...sometime I brought in as a team person. For
45 example right now I am working with a company, a virtual company. So, my

46 project manager is in Ohio, I think. But the person who does the graphic that I
 47 am working right now is in Rochester New York. Everybody works from
 48 home and we do everything by conference call. They have cloud sites where
 49 we put stuff up and somebody else can put down to share it. So it is really to
 50 me very innovative to do it this way because other companies would like me
 51 walk out my house but I am local. So they want me for meeting not by phone.

52 Q11 Can you tell you a Web Based Instruction project you are very proud of or got
 53 highly recognized?

54 A11 While I did one project for a part distributing company, and the part
 55 distribution company, they have to pick up the parts based on the tickets that
 56 they have to pack them so that the dealership could get the correct parts. And
 57 their pick rate was very low, a lot of mistakes. So they called me and I did an
 58 instructional design and I did a programming for it. I had one another person
 59 in my team. That was a liaison person with the company. She is also an
 60 instructional designer person so we did brain storm a lot. What we did was,
 61 first of all, we made into a movie. We took one person that was very good at
 62 their job and we video tape them doing the process the way the process should
 63 be done. It took long time to do it because it will be like, Ok, stop there so that
 64 we could get a close look at the hands, the pick card, or the bin and showing
 65 where the numbers were...because this was where the mistakes were usually
 66 happened. Transport the number or something and picked the wrong part. So
 67 we did that and then after they watched this, we also turned it into a
 68 game...and they will get 10 picks randomly and they would have to go on the
 69 computer screen know where they would go and which one they would pick,
 70 and whether they would pick it into a box or a bag and all the nuances that
 71 were part of their job to see if they can get a high score. We posted it out on
 72 the company's website that they have their own LMS and they have offices all
 73 over the country. So everybody could see it. And it went real good because we
 74 had one part distributing center competing with another one to get higher
 75 score in the game and then it went back to, you know, there was transform the
 76 knowledge to their job because all the sudden their rates went up and they
 77 were making less mistake when they were picking the parts. So we were really
 78 proud of that one and the company loved this one and on the first day they did
 79 this, the supervisor was like, "Oh this is the only computer playing the game,
 80 oh they constantly playing the game try to beat another parts distribution
 81 center. I am like, "You don't get it. Let them do that." Then they went to see
 82 the result, they were like, "Let's play the game." That we were really proud
 83 of. We were able to put something together that was in gauging for. Because
 84 they were guys that, you know, they were you know... "What I need to learn
 85 for while we know how to put a part..." We saw the performance
 86 improvement instantly, it was real fast.

87 Q11a How many team members in the project?

88 A11a while there was another instructional designer and me...I did the
 89 programming and then fortunately and unfortunately I can do video so I did
 90 video for it. I did video myself which saved a lot of money. But we had the
 91 corporation having people of the part distribution center. So even though they

- 92 didn't actively play a role of design part of it, they played a role as far as
 93 being such a manner as an expert to tell us what is important and then the one
 94 person that we video taped doing the whole process. So there are probably 5
 95 all together on the project, including people from the client side.
- 96 Q11b How long did it last?
 97 A11b 6 months. This was a long project. I worked on it pretty much every day
 98 though it was not exclusively. But it was pretty much. I mean when it was
 99 done I was glad.
- 100 Q11c What was the project about, was it about how to complete a step, process, use
 101 systems, or how to perform physical jobs, or change attitude/value?
 102 A11c It was about process. Yes, it was all process, when, where you get your tickets
 103 from, how to read the tickets, where to go to get your parts, how to bin the
 104 parts, and finally how to put everything together to ship to the dealership. So it
 105 is about process.
- 106 Q11di Describe the project in a very high level (the process by stages)
 107 A11di While we went through all the stages. We did the...they came to us, there is a
 108 problem, we did the analysis, then we did the development on that, then we
 109 design it first and we have to get it approval, then we designed it and we did
 110 the whole ADDIE process that is the only thing we follow. That was the
 111 ADDIE...There was an evaluation at the end when we started pull all reports
 112 to see whether their pick rates were up and up where they were. So we were
 113 able to see it because they were able to pick faster and we were able to see it
 114 because the errors went down. That were when the supervisor said, "Go play
 115 the game some more." They wanted no errors. During the course of our design
 116 and development, to refine the design or content, typically we did story board.
 117 We always done story board and then we take it to the client, we say that this
 118 is what we are doing and the client would say, yes or would you, oh we miss
 119 something here so we always go back and forth. Sometimes the design part is
 120 the longest part because we want to make sure it is exactly what it is before
 121 we get into the development. But we always consult it with our client through
 122 out design. Sometimes even during the development we are good as so far.
 123 Okay this looks like what you want... So I did both formative and summative
 124 evaluation at the end. We had a third company to do the implementation. They
 125 were the one that's responsible for the LMS. So when I am done with
 126 something, then I zip it and sent to them. If there is any hook that needs to be
 127 put in between what I wrote and they need to approve then they need to send
 128 that information so that I can put the code into the program so that it cock it
 129 each other and then they do all of the implementation part and put into the
 130 web making sure they can sign on and making sure it collect the right
 131 data...because this company, every time somebody took a course, it has to be
 132 recorded in that person's personal log when it was passed. They never want a
 133 score but just a "pass" or "fail". That is the another company. That does their
 134 part of the job. So we just pack the whole thing and ship to ... and they were
 135 launching it.
- 136 Q11dii Describe the project in as much low level (steps, tasks) as possible

137 A11dii while the first thing that we did with another instruction designer we did was
 138 ...we spent a couple of days in the parts distribution center and just
 139 shadowing with people so that we could understand what they were doing. We
 140 talked to the supervisor to try to understand with the wholes, which parts were
 141 the people missing the most so that was what we did first. Then we brain
 142 storm to come up with how we are going to do this. It is not like a dry. Then
 143 we decided to use video aspect of it so that we could, we were shadowing. We
 144 could video tape somebody doing the pick process but we have to identify
 145 every type of part that they could pick and also every way that they could be
 146 packaged so we end up with a grid that says, there are so many parts go into a
 147 bag, so many parts get tied, so many parts go into a box, so many parts that
 148 are solo, meaning that you just pick it up and put into the box for that person,
 149 for the dealership that going to. So we have to identify all of that and then
 150 figure it out how we are going to video tape them going up and down the
 151 aisles. Doing that where we have to stop to get close up so that they could see
 152 what was going on. Then we broke the process down into the different steps,
 153 then we video taped, we video taped so that they watch their own part then
 154 they got a bullet point that it says these are high level thing you need to
 155 remember then a couple of questions before they went on so that by the time it
 156 got done they were able to simulate the whole process and be able to identify
 157 how they were supposed to pick the parts. In fact, video shooting was the last
 158 thing that we did. We shadowed the job and they started to analysis the
 159 content. We did an analysis to the content. That was when we did the grid
 160 where we set the other stops and this is all the different way they can package
 161 so this is what we have to include when we do the actual training so that we
 162 don't miss any of the different ways that they can pick a part or package a
 163 part. So after analyze the content we started writing our story board and the
 164 video script because that was kind of simultaneous since the video is going to
 165 be the main part of whole instructional design, the instruction that we were
 166 giving to them. And as the thing we did, we got all approved because of
 167 course we miss things. I think we had about 3 or 4 versions of the story board
 168 script before they said this is good and this is what we are to do. When we
 169 released the story board to the client, we did the whole package. Typically, my
 170 experience has been to give them the whole package unless it is too big that it
 171 is module by module. But this one because it is one process even though there
 172 were steps to it, we gave them the whole thing because what we find is that
 173 sometime during this part of the process, they go, "Where is it?" Well, it is
 174 over here. So rather than going back and forth, shuffling a lot, we for this one
 175 we gave them the whole thing so that they could read through it and then see
 176 that we did have all parts in it even though they may have through there
 177 wasn't in a right places after they got done with it. Sometimes they would say,
 178 while move this over here or...but... Typically we gave them a flow chart in
 179 order to give them an idea what it looks like and give them a whole picture
 180 before start to read page by page, this is the process as we see it and here is
 181 the story board that replicates the process. It is about get content outline.
 182 Before I gave them the content outline, we did a task analysis just for

183 ourselves so we know what we are going to put the course for this one
 184 because we did the shadowing and we did one of the components of it where
 185 it was missing. Sometimes we don't. I mean that depends on what the course
 186 is all about. At this point we were up to the design, finished the design and
 187 been approved and it was when development started. That is when we start to
 188 shot the video, as soon as we start to do the programming and putting all the
 189 pieces together. I use Lectora to program. I'd use another one but right now
 190 Lectora seems to be the software of choice for most of companies. So I do
 191 Lectora and certainly it is expensive. I would say that it is almost \$2000 if it is
 192 not over \$2000, to buy though and that does include LMS. It is just for the
 193 software so that you can write the web design and instructional. I write my
 194 story board by power point. I do editing then I plug into. A lot of times I
 195 would like call it proof-read for whatever it is. We would like text on the
 196 screen to make sure that we got all the words spelt were right and all punctual
 197 were correct because I always tell people that I can design and I can program
 198 but let somebody else read it before it goes on the screen. Usually it is a
 199 freelancer that we know we can call and they can come in on a need basis and
 200 read through and tell them if it should be a coma or whatever. Once
 201 development is done, then we do have a website that we can put it up so that
 202 the client can review it and make sure this is really what they want. Which can
 203 again take anywhere from two days, to two weeks or two months because
 204 some clients are real good, this client was real good. But I had clients that they
 205 review it and they find 5 things that are wrong, they fix it and review it and
 206 they find 3 more things that are wrong, they review it then sent it to somebody
 207 else to review and say, "Couldn't you..." So sometimes the final stage of
 208 development get real long because somebody always come in and to say,
 209 "How about adding this?" No, that is out of scope. So once the client
 210 approves it, then I zip everything up the way that the implementation
 211 company tells me to, because some of them have SCORM compliant, some
 212 don't. So just tell me what to do and I will do it. And I turn it over to them and
 213 they did the implementation stage of it to put it up on the company LMS and
 214 make sure that everything is working so that the people could get credits for
 215 the course that they are taking.

216 Q11diii What event/communication marked the beginning of the project?

217 A11diii Usually in the beginning it is a lot of meetings with my client because you
 218 were doing you research to gather your information and you were talking with
 219 SMEs and then towards the end, you know, I can be sitting in my office for
 220 two weeks programming and not talking to anybody other than the emails that
 221 says the status, and that I go "Half way." Sometimes they request a status
 222 report sometimes not, depends on clients. For this client, they want to read my
 223 log hours every week. I got some client that they don't care how long it takes
 224 because they paid me a flat rate. If it is a hourly job, they typically want me to
 225 record at least once a week. So that they know whether I am on track as far as
 226 they budget for my part of the course. This client was a local in Michigan. But
 227 I have clients all over. I even dealt with people down to Australia...because
 228 we did everything over telephone, we don't need to travel to Australia. But it

229 was my clock it has to change so I can call them in their business hours. But I
 230 have dealt with clients in Australia, Germany, England and all is just virtual.
 231 And then it across United States. Anywhere in United States, I can have
 232 clients. Most, we are comfortable with virtual. As most of mine are virtual, I
 233 don't get sit with the trainees, those learners, so I just have to rely on... a lot
 234 of companies will have a training person as part of their organization. I just
 235 have to rely on them. A lot of time, I do my interviews over the phone, so they
 236 will tell me who...they will send me the names and phone numbers and
 237 subject of experts to call. And my first question usually is, who will be taking
 238 this training and what is the level of education? What are you expecting to see
 239 after they take the training? So that is how I know whom I am writing the
 240 training for. I had a company, telling me to make it very simple that these are
 241 the people who may not have graduated from high school, so keep the
 242 vocabulary to one or two selectable words, 8 grade reading level. I have had
 243 the other company to say, you know, these are college graduates. You can talk
 244 to them with...they have experience and you don't have to make real simple
 245 for them, just tell them the way it is. So, I rely on my subject expert and rely
 246 on whoever the trainers are in that company to tell me what level I need to
 247 write at. This client didn't require any documentation from us other than the
 248 project. A lot time, they may want me to turn in by material that I had, like the
 249 video and stuff like that. They want me to send out that too. Because that is
 250 proprietary that is theirs. But otherwise they don't require any type of
 251 documentation from me. As I had done works with this company before and
 252 they were saying that their pick rate is real low. They were actually losing
 253 money because if the people sent wrong parts then the parts have to come
 254 back and then they have to re-send. So they were losing a lot of money. This
 255 was why when the other automotive company filed bankruptcy ...so that they
 256 are looking the ways that they could get the act together improve the product
 257 and increase productivity and stop wasting money. And so they came to me
 258 and the other instructor designer, because sometimes we work as a team one
 259 of us calls the other one in a project. And told what the situation was there.
 260 These people should know how to pick, while they don't. Of course this was
 261 the problem and when we resolved the problem, yeah we can do the training
 262 for this. This was where we start the project. Apparently they thought they
 263 need a training. They didn't know why the people were messing up. We found
 264 this often happened and we found a lot of other things that were happening
 265 that caused people to make errors, like you know they got these parts on
 266 shelves and in bins and somebody has to stock these parts. And a lot of times
 267 we were going in to pick those parts from the bin, thinking that it was the part
 268 because it was the number on the bin itself, then we looked at the parts, it was
 269 wrong part, that wasn't that bin. So we were able to identify the other things
 270 for them, like whoever stocking the shelves, they need to make sure they put
 271 in the right parts in the right bins...because...you know they picked wrong
 272 parts might not because they didn't read the number, because the part that was
 273 inside the box was wrong. So we uncovered some of those things that they
 274 didn't realized it was happening. But the bottom line was that people were

275 paying attention. Typically I have to sign a paper says that I am working on
 276 the project, this is what you are going to pay me and this is how long it is
 277 going to take. Most...unless I am constantly on contract...I had some
 278 companies that I work with that I am constantly on contract so they just have
 279 me once a year to sign the paper which say "None disclosure" and this is my
 280 rate, you know, I work whatever you have work for me. If it is project by
 281 project, then usually for that project, I have to sign the paper. Or if there is a
 282 new company, then I have to sign paper...that says... I will disclose anything
 283 that is proprietary, all that kind of stuff.

284 Q11div What event/communication indicated the completion of the project?

285 A11div Yeah. After then got the...it was like first quarter. After first quarter, they are
 286 able to see everything worked...because even though implemented, I know it
 287 never done. They can still come back. They can still come back, not a lot of
 288 times. But sometimes they come back, Ok, you did, it looks good. But may be
 289 this question has been. Everybody is missing this one question for their test or
 290 we got a lot feedback. There is not clear about this one section. We thought it
 291 was written well but it was not. Sometime it is two years later they call me
 292 back, "Do you remember this project?" Yeah! "We need it updated because
 293 this part of process has been changed, can you do it?" May be...usually I can
 294 but I always say it is never done until it's dead. Because I had a call as far as
 295 two years after I thought that the project was completed while they wanted it
 296 update. But I usually to me after about two months that I haven't heard
 297 anything from them that I can consider completed. So I never have a formal
 298 written documentation say that ok this project... I usually once I turned in,
 299 once we, I always want to know the results sometime afterward, I want them
 300 to tell me, it is good. I figure that I am done.

301 Q11dv What was your role in the project?

302 A11dv This role, I did a lot. I did instructional design, I did the programming, like I
 303 said I did the video work for it, so I worked a lot heads on this project. While
 304 there was other instructional designer that I coordinated, we brain storm
 305 together how do we do it. She did some of the story boarding and script
 306 writing. So that the work was kind of shared. But she didn't do the video work
 307 with video editing and video work for programming. I didn't do the project
 308 management. I had a project manager that was the company that was on that
 309 from client side and the other was the one that hire me to do the project. With
 310 automotive company, they cannot hire me directly because they have tier
 311 system. So I have to always go through the agency. So that person is
 312 responsible for scheduling and that person is responsible for scheduling
 313 meeting, to kickoff, and kind of coordinating to make sure everything. If we
 314 have problem, like may be we need to video tape and we were getting push
 315 back from. The distribution center say, no no no, we don't have time, we don't
 316 have... then the project manager will step in and talk to their project manager,
 317 say if you want it done we have to do this. So that part of it, I don't get
 318 involved with. So just for this project, other time I managed my project
 319 myself. But it was, the client was so happy to get the project that they were
 320 just cooperated with us, no problems.

- 321 Q11dvi What software and services were used?
 322 A11dvi It was done in Lectora. I did the video work so we didn't any audio because
 323 everything was on the video tape. We didn't use any other services. It was the
 324 other company did the implementation to put it into LMS. I have EDIUS. So I
 325 use that when I did my editing for the videos. No graphics. Everything was
 326 either the video work or still shots. I can improve that video. I can design
 327 games as well in Lectora. We call it Yes/No game. It was, you know, they saw
 328 the ticket then they had 3 things that they have to pick from, there was timer
 329 going. So they had to do within 10 seconds to look at the ticket and decide
 330 what part number was that they would collect then they go to next one and
 331 say, ok, we are looking for the part. And you have 10 seconds, then how are
 332 you going to package it. You know the whole process. They have like 10
 333 seconds for each part. If they got any other wrong, it was like...eh. That is
 334 part. We kept score. They got points for everything they did correctly. And at
 335 the end, they were scored, like your pick rate was 75%, that is bad. We are
 336 looking at 90% pick rate. So it tracked all of that. And then it took that score
 337 and then sent it to LMS so that they did their own things at LMS to be able to
 338 say this part distribution center is working for 82% and this part distribution
 339 center is working for 93% per the game. Yeah, you can do game at Lectora.
 340 Programming codes are all in Lectora. It has its own programming language.
 341 If you know programming, then you know how to manipulate Lectora to be
 342 able to do all that stuff. I don't do Flash, but I do Lectora.
- 343 Q11dvii What hardware and devices were used?
 344 A11dvii You can work at any computer. I don't know if you have any problem
 345 between Apple and regular PC. But I have doubt. I have regular PCs. If they
 346 put on LMS. After that it is their problem. I have video camera and I had
 347 video taped and chopped into clips. It is all done on my PC. That is non-linear
 348 editing suite. I have to use video capture tool. I have a Rainier and a suite also
 349 because I used to shot video as a hobby. So I have that and it was a royal pain
 350 on Rainier. Now it was put on computer I was right there. It is like, give it to
 351 me, I don't care what is the cost. But even audio is the same way. I can do
 352 audio on my computer too by microphone...I can take any audio clips and
 353 pull out segments that went out bit or...do whatever I want really. While the
 354 record was somebody else's voice. A lot of digital. Digital record it up and
 355 goes right into the computer and I have a program that I can edit it with by
 356 Creative something. I think it is Creative Suite but it is not Adobe.
- 357 Q11e What were the outstanding features of this project?
 358 A11e The outstanding feature of that...It did what it is supposed to do. We
 359 increased the pick rate. We increased the product...they were making the pick
 360 more productive and they were not making errors that they were making. That
 361 was we made it so outstanding. The client was very happy about it.
- 362 Q11f Did it occur to you that you wish to have done the project differently?
 363 A11f Probably, I think that I would have it done the shot differently. Instead of
 364 following somebody all the way through, I think I would have it staged
 365 differently because I have to go to Chicago to do it. And so if I missed
 366 anything or something didn't come out exactly right...it was...ok, this is...I

- 367 am not going back to Chicago. So I think I would like to stage it differently
 368 where I could have something to start look at to say: yes...out of camera, I can
 369 rewind it and look at it but it still is not as same as when you are using it. So I
 370 would probably do it locally instead of going to Chicago. Then do the segment
 371 instead of the whole thing in two days, because that was really tiring. By the
 372 end of it, we were all tired. So I think I would want to do it differently.
 373 Because it would take longer to do the shooting but we would have each part
 374 of process nailed down before going to the next one. So if I have no choice
 375 but go out of Michigan to do the shooting, I would have take more time. Just
 376 say it is going to take a whole week. But not two days. But you see the mercy
 377 of the distribution center because that person was taken off the floor so that
 378 person was doing nothing for the two days except working with us to do the
 379 shooting. So it is very fine line there as far as what you were doing because
 380 they got rated on how many picks they do and how good they are. So for those
 381 two days, she was there and she was getting paid but she had no productivity
 382 for two days. So her supervisor had it taken into consideration so that she was
 383 not marked down because she was a star of our video. Because there is a kind
 384 of continuity with the video, so it is better the same person from the start to
 385 the end.
- 386 Q11g What were the solution(s) to the challenge(s)?
 387 A11g Do it differently and we would have stayed longer.
 388 Q12a What specific knowledge, concepts, and ideas that helped you?
 389 A12a While I think part of that helped me was that I like to write real engaging
 390 applications for...so if I can turn something into a game, I like to do that. I
 391 like to make things as...so that people want to do it as opposed I have to sit
 392 there to do the damn course. I think just like a fact that I like to make things
 393 fun. Helped a lot of to make this project do what it did. It was challenging
 394 though because it was the most boring thing that you could ever think of. I
 395 think as far as the knowledge goes, the fact is that they didn't have to hire
 396 somebody to do the video work. Because that has been always concerned,
 397 "You want to do video? Do you know what is going to cost you?" I am like,
 398 "Don't worry, it is part of my..." So that helped solve the idea. Other than
 399 that, I mean, it is just like, came to us like, "Why don't we do this?" And the
 400 client bought it. Because a lot of time when we went, "Why don't we...", the
 401 client went, "What?!!" This is why they hire me for my innovativeness. But I
 402 find some companies that still too, I don't want call them zero minded, but it
 403 was like, "Oh there was learning and it cannot be fun." Yes it can! Make them
 404 want to do it, not have to do it. A lot of times I am working with persons 45 to
 405 retirement age. So we are looking resistance of using computers because they
 406 didn't grow up with computers and so why do I have to sit in front of
 407 computer when Joe can tell me how to do it. So there are a lot of times we had
 408 to dealing with to...we have to watch to make sure that it is engaging for them
 409 without being too...I don't like to use word childish, but you know, a lot times
 410 I hate to say it...a lot of times, old converters, more resistance.
 411 Q12b What soft skills did you use?

412 A12b Being able to draw information out of people, being able to ask right
413 questions. That one thing that happens a lot is that you talk to somebody you
414 need to know about their job but they don't want open up to tell you. Because
415 they are afraid that...they might say wrong thing, you know. This is how I
416 have been doing it for ever. I tell them, "I am coming to you because...you
417 know, Jim said that you are the best person to do it" But they still get a little...
418 "What if I say this wrong. And here she is looking at me to get all the
419 information to train all these people..." So you have to be able to make a little
420 bit comfortable that... you know we may have to go over this 2 or 3 times
421 because I may not get it right the first time which then give them the breathing
422 room to say, "Oh, oh, if I get wrong while she comes back, we still have time
423 to correct it." So you've got be able to make the people feel real comfortable
424 that they are making the service and they are not going to reflect poorly on
425 them if the rest of the company doesn't do it good. And that no body is get
426 upset if they say something backwards the first time because they have been
427 doing this for so long sometimes you don't think about what you are doing.
428 You just do it. So I would say that is the basic soft skill that you need is to be
429 able to get to the comfort level there so that they know that whatever you say
430 to them or whatever they say to you isn't going to be spread around company.
431 If you were the person in Chicago that we video taped...we had to be very
432 very...we had to do it the way so that even though we have her single it out, it
433 was not us who are doing that, it was her boss is doing it. She was the best
434 one. But you still get the feed back when she was backward for the first time,
435 "How come it was you who got picked to be the star." You think we are out of
436 high school or grade school? But we are not. So a lot of times we have to not
437 only talk with that person but with other people, even talk to them so that they
438 feel they are important, it is not just this one person is important, everybody is
439 important to make the project work. So it is interesting a lot of times when
440 you are going to talk to them. When I do on the phone one on one with
441 somebody, no body else knows we are doing it. But when I walk into a place
442 and single somebody out, you can...sometimes you can affect the relations
443 with some other people that they are working with. Just ability to be able
444 really really listen good. Because sometimes, especially when you're dealing
445 with people, they have their own way of saying something because they are in
446 this shop and this is the way they talk in the shop. So you have to be able to
447 really listen to what they are saying so that you can translate what they are
448 saying into something that everybody can understand not just this one
449 particular group of people that they are working on it. So jargon changes from
450 area to area. I am dealing with company that has offices from coast to coast.
451 The way describing something in California may not be the way that they talk
452 about in Texas. So you have to have good listening skill to know what they do
453 mean, this and this. If you don't...otherwise, they will pick out. It is amazing.
454 "We don't call it that here." I am like, "Pick is pick..." So you have to have
455 good listen skill to be able to listen...is there something...especially...if there
456 is something in one shop, it is in one shop. Something that you are going to
457 put out across country, you want to make sure that what you put out there just

458 doesn't apply this one area, you can translate so that it apply to everybody.
 459 The only stress that I will ever get if I don't get the information fast enough.
 460 You know scheduling things...and I know the deadline is coming. The
 461 manager, or the client, wants to see something on that deadline. You don't
 462 want to go back to them and say, "P is on vacation for two weeks, I haven't
 463 been able to...", you know. So that is the stress that I get. I don't get too much
 464 stress from simulating information and putting it together and producing it. I
 465 like doing what I do so it is like fun for me. I find it interesting. I mean I have
 466 people saying, "How do you know all of that?" Well, you don't know how
 467 many projects that I have worked out, I just find it fun to learn different things
 468 that are out there and how different companies work something like that. So I
 469 don't stress too much about that. You know...sometime if I am doing
 470 something innovative, I might stress out because I am not sure if the company
 471 is going to like what I am doing. It is not necessary that everybody like
 472 something new. There is still a lot of people that you have been worked web
 473 based...they still want you to read the PowerPoint, bullet point that on the
 474 slide. If you say something that is not on the screen, you'd better put that text
 475 on the screen. I am like, "We don't read to people anymore." "No, you have
 476 to." "Ok..." You have to really love what you are doing with the energy and
 477 passion. Because if you don't, it is just a job and you are not going to produce
 478 it well. But I do. Every project that I get is like new and interesting. Some of
 479 them last six months, I am glad to see them go. But I am still looking forward
 480 to the next project. You have to always think about client. What they are
 481 looking for out of this and how you are going to realize their expectations.
 482 What can you do to resolve whatever the issue is that they brought in for,
 483 whether is pick, whether is being able to. Right now is getting a lot of sales. I
 484 can see the economy must be going up because they ask me to write a lot of
 485 sales, sales, sales training training, especially something like that...um, I have
 486 done sales so many times, to be able to nail down for that company. One
 487 company may say customer relationship is the most important thing about
 488 sales; while the other company is like, "No, we are a retail company, we want
 489 to make sure they make so many hits a day. So they want me to focus on that
 490 part of the sales, how to make calls, the cold phone calls...so I would say that
 491 you have to be able to zero in what your client really wants. You cannot come
 492 in and say, "Oh yeah, I have done this. This is how you should do it. They
 493 want you be able to take their culture, their way of doing things and then turn
 494 out something that will bring them to the next level. But you have to be
 495 careful about innovation. Be careful with that. Because some companies do
 496 want you...I have one company that was hiring me every time, they need
 497 something for client that is innovative. They were calling me, "We know you
 498 because you can...oh come up something really different." I don't tell them
 499 what secretes are, what resources that I used. But I am not afraid to say, "Ok,
 500 for this, let's try this, to make it engaging, different and innovative." But there
 501 are still companies that...you know four screens, two questions, four screens
 502 two question, they don't want a lot of clicking, they don't want a lot of
 503 rollovers, they just want text text text. I am like, I go, "O—k—a--y."

- 504 Q12c What hard skills did you use?
 505 A12c If you are going to be a strict instructional designer, you still need to know
 506 how to use Word, PowerPoint, all those types of tools to be able to get it done.
 507 Uh, just to use some, just be able to use some...you know what out there to be
 508 used. Whether you are going to iStock for you graphics, rather than to appoint
 509 somebody to take pictures and do you graphics, you have to be able to do that
 510 to present something to the client that looks good. When I first started, we
 511 could turn out Word document with squares on it, with the text to say, "There
 512 going to be the car" and "This is going to be..." because we didn't have the
 513 tools that we have today. Today, you know, you can get clip art, you can get
 514 pictures and everything to put in so they can see what is going to look like
 515 when was done. I think it makes easier but I still run across with people who,
 516 "I don't know how to do it." I am like, "Really?" So I think it is important to
 517 know how to use all those tools which are available to you. And I program
 518 also so that it gives me extra boost in the industry because they know they can
 519 count on me to program. I can do video and audio. So that is a few extra skills
 520 that a lot people don't have or don't want to have. It is not hard. As long as
 521 you find right tools, you can do it. So a lot of times they call me because they
 522 know I have those skills so they hire one person instead of three people and
 523 make it easier for them. They hire me and I find out person for them and I am
 524 only the contact person. You know I am not going to do that because...blah
 525 blah blah, but there is somebody can do that for you.
- 526 Q12d What attitude did you realize that was helpful for the success of this project?
 527 A12d (Answered in A12b)
- 528 Q13 Which year was the project? What do you wish to have known that you didn't
 529 know back then?
- 530 A13 That project was done four years ago. It was 2007. If there was something that
 531 I wish to have known that I didn't know, it would be just how long it is going
 532 to take. So I wish I have known that it is really going to be a humongous
 533 project and, like I said that, we could have done that in segments instead of all
 534 in one time, especially the videotaping part of it, it was very long and after
 535 two days videotaping everybody was wiped. So if I get a project like this
 536 again, I would say, "I think this is going to this many hours for videotaping.
 537 Let's do it two hours a day. Or there is something so that we are not tired.
 538 This was the first I did something this big. A lot of times, it is just small,
 539 snippet, for example how do you use fire extinguisher because we are doing
 540 fire safety course something like that. This was the first time that the video
 541 was really the whole course.
- 542 Q14 What are the other knowledge, skills or attitude which were not used in the
 543 above project but you used in other Web Based Instruction projects you led?
- 544 A14 Basically all projects used same skills. What I find in my web based courses is
 545 that a lot of times they want variations and then I have to figure out whether
 546 Lectora can do it or not, or whether Lectora is going to step on itself. For
 547 example, one of my clients always wants audio. Not a biggie. And then there
 548 is another client that they want audio and they want a repeat button, so that if
 549 the person didn't hear it the first time or didn't understand so they can say it

550 again. While there is a thing in Lectora you can do a repeat button, except that
 551 they don't tell you that if you don't change your MP3 file to FOB, it is not
 552 going to work right. So just to add this one button took me several hours and
 553 research to find out why it doesn't working right, you know. Then I had
 554 another client that want audio and video, "But we want parts highlighted in
 555 sync with the audio and the repeat button." While I can do the highlighting in
 556 sync with the audio, but we hit the repeat button, because this isn't a Flash
 557 video, there is no way that I can reset within that screen to redo all the
 558 highlighting. So I ended up using Camtasia to turn it into a Flash video so that
 559 when they hit the repeat button, the video replay and everything was in sync.
 560 So I find the knowledge and skills that I need to build each course because
 561 everybody is always looking for something different. I had one project that
 562 they said, "We need this re-done. It is a video. It plays on computer but is just
 563 a video. We had the permission from the company that sold this CD to reuse
 564 the video. They don't have problem with that since we have bought it. We
 565 want Lectora so that the video stops when you ask questions, all those kind of
 566 stuff. So, because they called, may be because they knew that I can do the
 567 stuff with the video. No problem, just give me the CD. While the video was
 568 not a video it was a Flash. So I didn't have the source file to edit and the Flash
 569 was right in the GUI. So, here was your video, but I have all of this around it
 570 and I am like, "I don't think this can be done." Really? But I did find another
 571 piece of software that like Camtasia but different. That would take the Flash,
 572 just the part that I wanted out of the Flash and turned into a video file for me
 573 and the audio, the whole nine yard. I found it and I go, "We are good." I am
 574 able to pull out the video out of Flash and we can do it. While the client just
 575 said that there cannot be any audio. I had to turn the audio off because they
 576 are going to look at it because there was sexual harassment course. Right there
 577 on the floor were customers coming in and out. They don't want their
 578 customers hearing like watching TV. I said, "Can you put a headphone on?"
 579 "No, because it would be rude to the customers." So like we have a sexual
 580 harassment course where what has been said is key and critical. You want
 581 video but don't want audio and you want me to turn it into a course. Ok. So, I
 582 took the video. I put it into Camtasia. I took select screen shots. Camtasia can
 583 also put the little talking clouds over the heads. I turned into a comic book. So
 584 they can get the expression on the face like, "You can say that to me?" with
 585 the caption above. The client loved it. But it was like, "Oh, my gosh", you
 586 know, where am I supposed to go with it if you throw everything at me and I
 587 cannot do it but you still want the course. So I did that and the client was very
 588 happy with it and they found that it is very innovative, see it is that word
 589 again. But, yeah, it joints different skills, joints different knowledge and I
 590 have to do the research to get it done.

591 Q15 Assuming you are hiring a person as a beginning instructional designer in
 592 Web Based Instruction, what skills are you expecting?

593 A15 I would expect somebody from beginning to have a general or broad
 594 knowledge of what can be done on the internet and what innovative
 595 capabilities are and understand what else can be done. Thinking out of the

596 box, rather than, while this is what I have seen, this is what we can do. But it
 597 is important to know what is our capability are. When I was first started, there
 598 was no streaming video. So there were a lot of things we'd like to have done
 599 but we couldn't have it done back then. But they can be done now. But if you
 600 don't know what's coming up, what's capable being done, then you are
 601 limiting yourself as far as what you can produce for your client. So I always
 602 want somebody from beginning to know what is out there. No like, this looks
 603 like fun to do, I want to do it. But to have enough interest in it to be able to
 604 understand and know what can be done. It is good they have programming
 605 skills but it is not important. If they are going to do the instructional design
 606 though, they need to know so that they design it so that whoever is doing the
 607 programming wouldn't sit there and go, "What?" So that they can do the
 608 design so that utilize what is out there.

609 Q16 Assuming you are hiring a person as an experienced instructional designer in
 610 Web Based Instruction, what skills are you expecting?

611 A16 If they are experienced, I would want them to have done in a lot of different
 612 types of web design programs. I would want them to have done things in real
 613 time. So that they understand what involved in the and how it can be done. I
 614 would want them to have done the things that are highly interactive that they
 615 know when there is too much text down on the screen and when they need to
 616 divide the screens to do either rollovers or clips to bring up information as
 617 opposed to trying to show all of text on the screen and try to, you know, move
 618 from six words. No. So I want them to have that type of experience so that
 619 they have already done things just like that where they had process, they were
 620 able to, they knew enough to say "We can bring them back to user's process
 621 screen as menu and then they can click on each part of the process to be able
 622 to go to that section and understand what it involved in that section so that
 623 they know that things don't have to be done linearly that people can access
 624 things randomly. So I want them to have those types of skills. They have done
 625 something like that. It is past experience. I would expect them to the extent
 626 know how it is done to be able to do it. Because I have seen more and more in
 627 this business where, because the economy the way it is, people don't want hire
 628 5 people. They would rather hire 2 or 3 people who can overlap their skills
 629 and work together as a team to get something done as opposed to, "You do
 630 this part, you do that part, you do that part and we hope to got everything
 631 working together. So the more hats you can wear, the more marketable you
 632 are, and the more you understand what is involved in that. That is not
 633 something that is going to takes 5 minutes to do. This is he part of design is
 634 going to take a whole week for somebody to be able to program it properly.
 635 Other skills and attitude...no matter whether a beginner or an experience, I
 636 still want somebody to be out there looking to know what are happening. So
 637 that when something new comes out, they go "Oh, I don't think that
 638 something would ever happen." "Where were you when it was in the design
 639 stages?" I mean, I am part of Lectora beta team so that I get to see what's
 640 going to be coming down so that when it is ready to be launched, I am already
 641 thinking about what kind of project can use it. Whether it is beginner or

642 expert, they need a “Can do” attitude. They need to be able to say, “Well, I
 643 have not seen this being done before, but let’s see if we can do something like
 644 that.” Rather than having, what I call a “Cookie cutter”, you know, everything
 645 you bring to the person, it looks the same. To be able to vary it, to be able to
 646 look at the client and say, for this client, we need to do this, do this. This
 647 client, it would be like... They are going to be using the computer at home as
 648 opposed to in their place of employment so that we want to make sure it can
 649 work on APPLEs as well as PCs. So their attitude has to be what’s going to
 650 take to make the client happy and what’s going to take to the client feel we are
 651 doing the best that we can.

652 Q17 Which direction do you see Web Based Instruction is heading to?

653 A17 Web based instructional training is going to be more. I am seeing it go more.
 654 Especially with everything being up in the Clouds, being able to share more
 655 stuff. I would like to see some of the courses going or you can have
 656 collaboration between different learners. We are right now you sit in or on you
 657 PC yourself. If you are fortunately enough to be able to do real time or you
 658 have an instructor there or you have 2 or 3 people doing it, that is fine. But
 659 now that we got the share out there where up in the Clouds, why cannot we do
 660 more collaboration where you are doing a group of projects even though one
 661 person is in Cincinnati, one person is in Tampa Florida...that can still
 662 collaborate, and talk and do project together, even if it is, you know, you don’t
 663 have to see each other face to face. So I would like to see more things going to
 664 that direction. What I have seen a lot of companies is everybody, while, this is
 665 me here in Atlanta. Even though I know that there is another office in Huston,
 666 they don’t affect me and what we do and I think they are able to collaborate
 667 and know...it is just like what the game was and the score was being
 668 posted...they start competing. If we can get them collaborate that way of
 669 eLearning and that would have more continuity in some of companies
 670 between workers and everybody is learning together. So I think we are going
 671 more and more towards that type we are just sitting here and on LMS. But we
 672 will have access to be able to communicate better with other people no matter
 673 where they are. Something about Cloud, while the company that I work with,
 674 we have a virtual storage place somewhere up there and when I get done with
 675 the project, I move it up there and identify who needs to know it is up there so
 676 then they can take it and review it, put it back up. We have just got one step
 677 further when a project is reviewed it is out there in a website in a real time, a
 678 spreadsheet and whoever review it can say screen 7, the text is out of the
 679 alignment. I will see it instantaneously. It is like instant notification while if I
 680 am up there, I can refresh and I will see it instantly. Otherwise I will wait until
 681 it is done. I mean, they could be doing it in the morning. But the thing is, we
 682 don’t even have to send it through email any more. I can see it as they typing
 683 it. If, you know, sometimes we got project that, you know it is like, if it due
 684 before the holiday is come. While this way, I can have the course open up on
 685 my screen and I have two computers. So I can have the other computer on
 686 with the spread sheet and every five minutes, click on refresh button. Ok, now
 687 I have got 3 more things. It is not RSS yet, but I imagine that is going to be

- 688 next step, it will be the step that will refresh itself. It is kind like Facebook,
 689 although the one that I was on was a password protected, to the point where I
 690 put something up there, I can hide it as private so that then not just people in
 691 the company who has password can see it but only the people in my team can
 692 see it. So it got little protection. I have to buy this space.
- 693 Q18 What do you think an instructional designer should do in order to keep up
 694 with this direction?
- 695 A18 They just need to subscribe to either online sites or magazines that are in their
 696 field so that they are constantly being updated. What's going on what's
 697 coming down the pipe, what's the other people doing, what's the other
 698 companies doing, attend conferences because that is where you get some of
 699 your better ideas, is finding out from the speakers, what they have done so you
 700 can say, "Oh you can do that? I can build on it?" Or "Gee, I would never
 701 thought I was doing that." You know, we never stop learning and so whether
 702 you are doing over the internet, getting paper magazine and attend
 703 conferences, you always need to, because at least to know what is going on. I
 704 subscribe to several different information centers that send me emails daily,
 705 periodically and different things happened in the industry. I can see it - Oh I
 706 need to try that, oh I haven't found doing that. Really I can use Facebook do
 707 training?...I don't think so but...if you tell me that somebody is doing it, I am
 708 going to believe you because people are glued to Facebook, but...really? But
 709 if you are thinking about it, you can collaborate on Facebook. So why not use,
 710 set up a group to use that way. So...but...if you don't keep up what's going
 711 on, you are going to find yourself, you know, out of job, producing "samo,
 712 samo" instead of coming up with different ways to do things. I am on
 713 LinkedIn and Facebook. And a lot of time, I got a lot of information from
 714 LinkedIn because of the people that I am with, they published things so...and
 715 the same with groups, they publish different articles. These are good articles
 716 to read. So I get my information that way too. LinkedIn is little bit more laid
 717 back than Facebook because nobody tells what's having for dinner, but I find
 718 that a lot of groups they do post good articles, and so it's like why I have to
 719 subscribe magazines? If you don't, get linked. I belonged to ASTD. I am still
 720 active at ISPI. Those are the two for the instructional design part. I am part of
 721 Lectora group for the programming side. To me those are the 3 main
 722 organizations. There are a lot of learning guilds, but you can get
 723 overwhelmed. But even there are a number of groups that you can join, then
 724 all you're doing is go to the meetings...you can only network so much... ISPI
 725 convention and I found them very valuable. My circumstances right now is
 726 that I cannot really go to the conventions so I don't do that, I do everything
 727 virtual, webinar. Yeah, webinars are fine with me.
- 728 Q19 Anything else that was not covered in our conversation but you think is
 729 important?
- 730 A19 No, I think you covered everything. At least I told you everything.

1

Transcription of Interview 005

- 2 Q1 Good Evening, thanks for taking time with me. Can you tell me your current
3 job title?
- 4 A1 The company identifies me as training specialist, within the department the
5 job is instructional designer
- 6 Q2 How long have you been working in the current position?
- 7 A2 Since May 2010, a little over a year and half
- 8 Q3 What's your age range: 25-35, 36-45, 46-55, and 56 above?
- 9 A3 36-45
- 10 Q4 Would you say you are actively involved in instructional design?
- 11 A4 yes
- 12 Q5 Are there any other positions have you held before, that were related with
13 instructional design?
- 14 A5 Actually I have been doing instructional design and training since 2000, a lot
15 of design and development of content for both the web for instructor led for
16 blended, I also do for the standup training. Within these roles, some
17 companies required me to manage the projects, currently I do project
18 management as well as the design and development. So really for the past
19 decade and a little bit more I have been pretty much working exclusively on
20 instructional design and development.
- 21 Q6 How many years accumulatively do you estimate you have worked in
22 design/development for WBI?
- 23 A6 About six. Some of my positions like this one and all my other jobs were
24 about web based training.
- 25 Q7 In those WBI projects, how many years accumulatively do you estimate have
26 served as a lead instruction designer/developer?
- 27 A7 I will estimate that as about four or five years I was leading projects. Basically
28 when I am on a project, I am the instructional designer, the developer, the
29 project manager, pretty much everything. The person who is my manager has
30 a very hands-off approach. So you are pretty much responsible to get it all
31 done. And the only time you correspond with her is when she needs an update
32 or she reports to somebody or when you have a problem you go to her,
33 something that you can't do on your own.
- 34 Q8a What's the major of your bachelor's degree
- 35 A8a It is on human resource development with specialty in Training and
36 Development.
- 37 Q8b Did you have postgraduate education: Master's, or Ph.D.?
- 38 A8b A Master's in Training and Development. Same school.
- 39 Q8c Have you had any other training on instructional design?
- 40 A8c As far as training outside that, not very much. In 1999 and 2000, my company
41 actually put us through a web development course, I think it is a day or two,
42 it's been so long I can't remember, because they merged with another
43 company, they sort of worked us through web development one on one, but
44 my formal training was through school.

- 45 Q9 What's the business nature of your current organization: business/industry,
46 education, government/military, health care, independent, other?
- 47 A9 They have multiple business, mainly insurance, so it is business
- 48 Q10 What's the estimated size of the organization you are working for?
- 49 A10 5000 employees, it is not global but the footprint is throughout the country.
- 50 Q11 Can you tell me a Web Based Instruction project you are very proud of or got
51 highly recognized?
- 52 A11 One project really comes to mind because there were two separate phases, and
53 I was the project manager and designer and developer for both phases. I was
54 developing web based training for both product itself as well as the system
55 piece. And it has to be rolled out not only to in-house employees but
56 independent employees who work for the company but not employed by the
57 company. So I had a very large audience, as matter of fact, when it comes to
58 the time to load the training and implement the training, the LMS
59 administrator told me, "Wow, this is the biggest assignment." It touched a lot
60 of people. I wasn't long with the company, I was working on a part time
61 temporarily basis, so I don't know the manager had a lot of confidence on my
62 skills, or she was going to put me in it regardless. So it has a very positive
63 outcome, so I am definitely very proud of.
- 64 Q11a How many team members in the project?
- 65 A11a In my group as far as the plain organization I was the sole point of contact, it
66 was a stand up trainer who had to do a piece for the implementation. We had
67 to come up a workaround plan because some of the independent employees
68 did not have the computers that were able to run the Flash based simulation
69 pieces in the training. So that individual (trainer) did that piece because the
70 way our department is divided, the instructional designers and developers
71 never did training, they always have to pass off to another group who does all
72 the standup training. My team for this project consists of about 12 members
73 who met regularly, and I was really just one functional area that support the
74 project, you had IT department, you had product people, you have people
75 from the claims organization, you had people from different parts of the
76 corporation and my function was basically to support their training need. As a
77 web person go to, really. The reason why we needed a trainer to implement is
78 because the implementation was just for independent employees who did not
79 have the computers to support the Flash, so we had to recorded part of the
80 training for them. There were three courses, one of the courses everybody can
81 get, it didn't have Flash in it, the other two did have Flash. If you were
82 employed by the company direct, the infrastructure supported Flash or you
83 can get whatever support from IT to run it. If you are outside the company
84 infrastructure, you didn't have IT support. It was really a hit or miss, so there
85 was a workaround. Initially eLearning was supposed to be the solution across
86 the board, so it's really kind of funny how things sometimes work out. The
87 support team, we got together regularly, we talked about the system and what
88 will be implemented. I was representing training and development in those
89 meetings, and there were meetings of course outside of those meetings to
90 work with SME so that I could ...and that worked well. I tried to fill the gap

91 and educate them about the system, product and new system it was tied into.
 92 Of course we worked with the SME to work out the scope with the design
 93 documents. This particular project, I developed in Lectora, so my
 94 storyboarding/developing was done in Lectora. I did software simulation in a
 95 system called YYYYYY which is not commonly used but that was what they
 96 have available. That...to give you more details...okay, we will get to it in a
 97 few questions. In this particular company, it is pretty much how it goes: I was
 98 the only one working on the project. For the most part, the other team
 99 members were working on their own projects. The training in this company
 100 for the most part is centralized, we get requests for project, we don't go out
 101 looking for them. Like right now I'm working on a project that really came
 102 out of this customer care initiative. They came to us saying there is a need for
 103 training. We had a customer service issue related to how the employees
 104 discuss this certain information with our clients, when each some training to
 105 build the skills so for the most part and since I have been there. I had really
 106 walked home my project by myself doing the project management day to day
 107 creating the project plan and I created my project plan based on the ADDIE
 108 model since that's what I do in design and development. But at this particular
 109 company I haven't done much collaboration with other people in training and
 110 development. When there was a product team meeting, basically I went to the
 111 meeting listening to them talking about implementation, what code drop just
 112 appeared, what problems we are having. They were working with other
 113 vendors on this system, I just report to them the progress of the training if I
 114 have questions and concerns. I feel appropriate to address with the group and
 115 this key stakeholders and responsible parties I bring them up. But most of my
 116 work goes outside of those team meetings. I had to meet separately with
 117 SMEs. As far as working with my peers, our process was a little broken. I
 118 came in as an experienced trainer, so I would do things like ask a peer to
 119 review what I put together. I made it a common practice -- okay I'm going to
 120 show the client the prototype, I'm not going to develop all those in the end to
 121 show them so they can say that's not what we wanted. I had really had to do
 122 with them using the systematic approach. Having the scope design document
 123 signed off, working in such a way that it is not a half haphazard. I had
 124 colleagues who don't use the standard instructional design process and the
 125 department is actually going through some changes and I think they are trying
 126 to have us work more collaboratively, which I had done in the past. I actually
 127 worked in the team when we worked in a common course or a common
 128 curriculum at least. So this is unique in some ways. The project I am about to
 129 launch right now, I actually had the opportunity to really run the project team
 130 because when it started out our sponsor was from the call center. As I did my
 131 investigating and analysis, I found out our audience really need to include all
 132 the employees, not just this call center. So bear with people how you go
 133 everywhere in different states. Plus there were people who were employees
 134 who've been sold products. So I ended up working on to put together a
 135 working team, people who were really field representatives the field managers
 136 across the footprint and I set up all our meetings and I pretty much from our

- 137 training perspective ran this project. I was kind of the business readiness lead
 138 of this one, which is little bit different from those enterprise projects, but still
 139 in my group, which is training and development, we worked very individual.
- 140 Q11b How long did it last?
 141 A11b The first product system phase I worked on it from June 2010 and delivered
 142 all the courses by September 2010, it was about three months. Then there was
 143 second phase, which was really another project, even though it was the same
 144 key stakeholders. It was about 3 months from my initial engagement. And
 145 they still very much need someone to do analysis and came up with the scope
 146 and then by the time it was being delivered and available for the employers to
 147 take it was about three months. The second phase was probably shorter
 148 because the system piece, the system was very similar but there were
 149 uniqueness. There was enough uniqueness so that I needed to another system
 150 training but that prerequisite wars or assumption wars you are familiar with
 151 the other system and since they were very similar. I was then going A-Z, I
 152 was really telling you what you need to know specific to the system. The
 153 product was a different product. It was a different type of products so that
 154 was, you know, new information. It probably took two months.
- 155 Q11c What was the project about, was it about how to complete a step, process, use
 156 systems, or how to perform physical jobs, or change attitude/value?
 157 A11c The training was actually system training and it was a product itself not so
 158 much of procedure because these people knew the procedures that was related
 159 to their job. They knew how to sell this product and to use this new system to
 160 sell this project
- 161 Q11di Describe the project in a very high level (the process by stages)
 162 A11di I started out with analysis, definitely did design and development,
 163 implementation for a large audience, you know, was assigned eLearning, put
 164 the eLearning in the eLearning LMS. I had to oversee implementation
 165 involving the standup training that was recorded, place out there where those
 166 independent employees can see it. As far as evaluation we have a standard
 167 level I survey that I didn't have anything to develop that, it's been there.
 168 There's no desire to change it with each course, this kind of stays there. And
 169 there was level II actually, that at the end of the course assessment for the
 170 product training and they learn I had to pass with 80%. The requirement was,
 171 for the first three months after this was launched, they wanted us to produce
 172 report that shows how many people had accomplished the training. The thing
 173 was, there was no limitation you can take as many times as you want it, it was
 174 compliance training. In this particular company, there was usually no
 175 consequence for not passing. No requesting yet to revise the course, not yet.
 176 Very positive feedback. My chief learning officer was told by one of CEBT
 177 that this was one of the best training they had seen from this department. Part
 178 of is because my skill set, part of is because a lot of the people in the
 179 department they weren't familiar with how powerful eLearning can be, how
 180 you can use it very effectively. So that was a personal win for me. That is one
 181 of the reasons why I decided to talk about it. This project is a big one, it was
 182 something I was assigned to in the beginning of my tenure here and the

183 outcome was successful. I got positive feedback from my learners. I got to
 184 know some people because there was a situation when I did a class with them.
 185 So I got to know quite a few of them in the call center quite personally.

186 Q11dii Describe the project in as much low level (steps, tasks) as possible
 187 A11dii At the beginning when I was assigned with this project, they had already
 188 determined the implementation data of the system. If I remember correctly,
 189 they already determined they needed a product piece. After doing some
 190 audience analysis, it actually took me a little time to realize how large the
 191 audience was for this training because what ends up happening in this
 192 meetings is the people they...and the call center represented the staff. You
 193 know they need what they need. But a lot of times people out in the field
 194 don't get represented in the same way. So I went out trying to find out by
 195 talking to different people, okay we got all different kinds of classifications of
 196 employees. What's the difference in the job they did, what particular needs do
 197 they have, what's the commonality... and that's how I found out that all
 198 employees needed to take the training, so uh, that's how the audience got so
 199 big. And it got to the point when I was well into the design phase, I found out
 200 okay we have some independent people out there, even though we cannot
 201 police whether they take it or not because they're not employed by us, we need
 202 to make it available to them. That's how we found out about some of the
 203 system's shortcomings because I actually went out to a field office and I said
 204 okay let's see, let's take a look at the prototype and they could not run it. And
 205 there was nothing the company could do because they did not own that
 206 equipment. So that's how that was kind of figured out. But after the initial
 207 audience analysis and content analysis and basically there wasn't any existing
 208 content, what I had really was the processes that were in place for another
 209 system that was used to sell another similar product. So I got some familiar
 210 with the current workflow and I had to gauge how this new workflow was
 211 different and how was similar and that helped me to decide how to represent
 212 it. And I decided to do software simulation that's actually walked them through
 213 using the system because just doing a screenshot with callouts, that wasn't
 214 sufficient because that was a different system and the way it was navigated,
 215 the look and feel of it... even though the information was very similar, they
 216 were different navigation all together. That's so that's why I decided the
 217 simulation was the most effective way. And I ended up using a tool that was
 218 new to me because they do not have Adobe captivate or another software for
 219 simulation, no Camtasia, we have Captivate now we still don't have Camtasia,
 220 so it was interesting. I was learning that system, while I was learning this
 221 system. So that was interesting, that keeps on your feet. I tell you, it definitely
 222 does. There was a product lead and one of his reports was my main SME on
 223 the product side. She was the one who was able to tell me the rules and
 224 guideline, and how they varied from state to state so when I was actually
 225 presenting the eLearning of the product, she told me for example in Michigan,
 226 here is the rules, here is the type of product that goes under this category. So
 227 those were kind of things I actually worked pretty closely with one SME.
 228 When it came to system, I actually had access to the same test system that

229 they were developing in, so I could go in and do my simulations. Of course, it
 230 was unstable. There were bugs, sometimes it was down, there were spans of
 231 time when I could not use it because they were dropping code and I had to
 232 wait. And there were period of times when...if I had taken that and simulated,
 233 it wouldn't have really looked like the production system, so I had to wait for
 234 them to do something so I had to do some mocking up...things like that. It's
 235 common. It was an interesting experience in that they knew what they wanted
 236 but they didn't know how to get there. I had to educate them exactly what role
 237 the training and development plays versus the other departments because there
 238 were times when I get questions and it was obvious that they did not
 239 understand. For example, they had a vote Go or No Go, that's what they call
 240 it, on whether they implemented the system and they went around the table
 241 and when they got to me and I said pass. As your support in training and
 242 development, I don't get a vote on this matter, I don't have enough information
 243 to vote on it. I am supporting your timeframe, I am having training ready in
 244 advance of your launch, I want to help people be able to navigate the system
 245 and understand the product. So when they hit the floor and run it, they would
 246 have knowledge base. And I actually had to explain that gently in a non-
 247 threatening way to them, that we are not part of the system implementation,
 248 we were supporting the learning of the employees. So uh they got very
 249 comfortable with me after a while. And even now... because this second
 250 phase the training has been done for a while but they haven't launched yet,
 251 they may have questions about ...okay, we sent out this communications to
 252 the enterprise, we just wanted to make sure that when it comes to a training
 253 dah dah dah... So they are definitely pretty comfortable coming to me when
 254 they maybe have a questions where there is a gray area and uh. I think what it
 255 is that my focus on customer service, my focus on learners makes them
 256 comfortable coming to me, whereas working with somebody else they may go
 257 to the big boss, or they may try to guess at it themselves, or may they missed
 258 the opportunity because they needed the information and they just let it slide,
 259 and maybe there's an error they needed to clean up later. I'm easy-going, the
 260 personality makes a difference. I try to let them know that if they have a
 261 question, I would try to answer even if I may not have the answer, I may help
 262 them figure out or get to the right person. You definitely, I think, when you
 263 develop certain relationship with your client, it helps you get what you need
 264 because as you know sometimes when you go in and you are the outsider
 265 that's working with them on their area of expertise, it can be threatening to
 266 some people. So if you don't handle it in such a way, either one or two things
 267 would happen. Either they would be very very intimidated by you and maybe
 268 they won't devour the information. Or maybe instead of consulting with them
 269 working with them, they would dictate to you what you need to do. So it's
 270 kind of a balance. During the design phase, I put together a design document
 271 that outlines my terminal and enabling objectives. By the way I do not use a
 272 lot of training talk with my customers. I think even in the document I changed
 273 the word terminal and enabling to main and supporting just so to sound like
 274 more like a regular person would understand. So I delivered that objectives

275 out, I talked about what type of training solution, which is eLearning in this
 276 case, it is pretty much all I have done. I talked to them about in this document
 277 I outlined what the reason is somebody came to you and said there was this
 278 needs, so I talked about it and gave them some background information in the
 279 design document what are the big goal is, what are the main and supporting
 280 objectives are. I talked about in this document whether or not we are going to
 281 have level II evaluation. The truth is as a company we should be doing level 3
 282 evaluation, we don't, unfortunately for a couple of reasons I think: time and
 283 lack of knowledge from top-down maybe, we don't do it enough to see how
 284 the training actually transformed back to the job. I can get a good idea
 285 sometimes because I am working with the same person on different projects. I
 286 can see the difference. The way they responded to you shows that indeed the
 287 value of what you did, so it must be working. But there isn't enough formal
 288 level 3 evaluation, we don't go back to observe and see these skill in practice.
 289 We don't do surveys to follow-up. It's just there. The design document also
 290 includes detailed outline. So for me at least when I coach new instructional
 291 designer, I tell them this: By the time you're done was your design document,
 292 you should have a blue print for your course. So you basically are ready at the
 293 point to start putting it together based on the design, it should be
 294 comprehensive. I worked on a project, a small project prior to this one where
 295 I actually did not do the development piece. I passed on to someone else and
 296 she actually put into Lectora. She did the development work, I had a hand on
 297 it, but she did most of it. So I did storyboard using MS Word. What I find is:
 298 if I'm designing and developing it, I don't do the extra step because I don't see
 299 any reason to use Word and use Lectora. So this is what I tended to do. I tell
 300 you, as I'm developing, my design...even when I backed to do my analysis,
 301 such as the ADDIE model, it shows as linear but those work in the field know
 302 it is actually not, it is very much a reciprocal thing. So, I'm thinking about
 303 what multimedia elements I want to use. For this current project I decided
 304 pretty early on to use some audio because I want the employees to hear some
 305 successful examples of what I was teaching them. So I am thinking about
 306 how I am going to present the content pretty much from the start. I am
 307 thinking about how I would assess the information, even if there is no
 308 accumulative test in the end, I always use knowledge checks throughout the
 309 training is an opportunity to see if they are actually getting it. So by the time I
 310 am in the end of the design stage getting ready to development, I have a good
 311 idea of my multimedia elements, I have a good idea all how I'm going to
 312 assess. I probably start to collect graphic library for this project. I'm saying
 313 that because we don't have very strong graphic library. And I started creating
 314 one because there are some usable stuff out there. The last project I was
 315 telling you about, I kind of have unique stuff, so there were certain things I
 316 have to go out and buy it. We should really have a graphic repository where
 317 we can use stuff and reuse it, and do whatever is needed. Technically I have
 318 been mentioned it up till now: we technically have a graphics specialist in our
 319 department. It is good, but she is not really a graphic artist, since she is not
 320 one of those people who can give a description or sketch something out, it's

321 not like that. I usually do my own graphics because it is more efficient
 322 because I know the content I need I don't want to get it an animated picture
 323 something is not really appropriate when I can just go out and get something
 324 or mock up something and to do it myself. Now, with the direction the
 325 department is trying to go, I don't necessarily see it to be used more because
 326 we got quite a few instructional designers and developers and the just one
 327 graphics person, if you got to get something done you must get it done. You
 328 really don't have time to wait. Plus, there's learning curve issue. I always like
 329 to have a prototype. What I usually do is take a relative small content such as
 330 a lesson or maybe less than the lesson and developed it a prototype to give
 331 them a look and feel. We always have a template we use, so as far as
 332 company color the border, that's all set. The rest of it, there's always room for
 333 interpretation. So I always give them a prototype that lays out the
 334 instructional method, what's been used, give them an example of an
 335 assessment question, the multimedia elements I am introducing. And even
 336 though I usually will continue to work whether they have approval or not, my
 337 mind is that take a look at this and tell me what you think and give me
 338 feedback, then we can proceed. And that's how it is - the checkpoints,
 339 milestones throughout so you got to approve the scope in order for me to do
 340 the design, you got to approve the design in order for me to do the
 341 development so on and so forth. And I find this systematic process as far as
 342 you are flexible enough to meet the business needs, I think I have my
 343 systematic approach works. Usually I tried to build my prototype whatever
 344 piece in the training I am showing them. I have a shell but it functions. If
 345 there's a mouse over, it functions, things like audio and video at that point
 346 usually not. But there's a placeholder for it to show them how it looks. If
 347 there is maybe a PDF I want them to launch from our page, usually we tried to
 348 build just a few pages so it is totally functional. It gives a good idea what they
 349 are going to get. When it comes to audio, and this is the first project we have
 350 an audio since I have been with this company. We have a studio, that
 351 president he used for his broadcast. So it would be professional audio, the
 352 team of course developed the scripts. I probably wouldn't be doing the
 353 recording, we actually have the people to support technically. But I have to be
 354 there, I have to make sure the audio got put in, just to make sure the actors got
 355 rehearsal, that kind of thing. I really had to coordinate everything. Now I have
 356 colleagues who worked on projects in pairs, I wasn't close enough to know
 357 what the breakdown was as far as who did what. I think there is one lead and
 358 other supported her. I got the reputation to be good and fast. So when
 359 something needs to be done I just do it. As for animation, we don't have
 360 anybody would can pass on to. I had actually worked for a company, we did
 361 the raw in Captivate and then passed to a developer, and they did the cleaning.
 362 Currently I did all of that. If I had to really re-recorded a simulation I had to
 363 do it. With the audio, because they had a professional studio, they will do the
 364 cleanup. That's really nice because it's not your expertise. I had used video in
 365 other companies. I had support from the video department. I actually
 366 requested that... and I kind of mentioned that we signed off the scope so we

367 are all on the same page. So if this scope changed I could go back and say
 368 that's what we agreed on, and if we had it to do this plus this and this, it could
 369 affect the timeline and all that good stuff. They signed off on the design and
 370 we started developing, they signed off on the prototype. They signed off on
 371 the final content. Before I would do any audio recording, the script text has
 372 already been approved. And I include a transcript because the people out
 373 there who don't have sound product on their PC cannot use audio because they
 374 are in the call center they don't have headphones to use or whatever. So,
 375 before I involved those professionals who are doing audio video, the scripting
 376 has to be approved. We need word for word the verbiage. It is expected that
 377 we do all the signoffs, people do not always sign on the written documents
 378 like I signed that. So if people send e-mail and saying I approve it, I save
 379 those as part of the project folder I have that actually says approvals because
 380 sometimes the papers were get lost. I don't like a lot of papers around me. I
 381 do eLearning so why should I have all those papers. Generally before we got
 382 a final signoff on the course, we had a meeting or even maybe more than one
 383 meeting, we went over each lesson, we talked about it and everybody on the
 384 project team who is a subject matter expert had a chance to make suggestions,
 385 revisions, and correct that information. And depending on the project, and
 386 that takes various amount of time. The key signoff individual or
 387 individuals... I tell you it's better when it was just one versus the whole
 388 team...when they get the SMEs have done their feedback and made
 389 suggestions, I would have gone through it and try to have it waiting edited by
 390 one of my peers like proofreading, but sometimes it didn't always happen.
 391 There had been times when I asked somebody to do it, nobody would do it.
 392 You cannot edit your own words, but I did the best I could. Right, sometimes
 393 you looked right over your own mistake. By the time the person who was
 394 responsible for signoff gets it, the content experts had their input, there usually
 395 has been some revisions made and then based on whatever their response
 396 says, there are changes to be made again, of course. In most instances, I don't
 397 have to have another signoff, it's usually...okay, I approved this this this and
 398 this change. And some of the project teams have a pilot phase because they
 399 only want to roll out their new system to a selective few so they had the phase
 400 approach to have a training that is implemented. But from our perspective,
 401 what we usually try to do and I suggested this simply because you know we
 402 are not dedicated to a particular customer. We are dedicated to the whole
 403 company. Okay as long as this training has been approved let's make it
 404 available to whoever needs to take it. If there are some problems, something
 405 we need to change, we could come back to look at it. But we kind of like to
 406 care the customer and move on because they always have another project to
 407 deal with. We don't want to waste our resource on something that's already
 408 has been developed and ready to be implemented.

409 Q11diii What event/communication marked the beginning of the project?

410 A11diii The training management of the department came to me with I don't know
 411 what you want to call it because it really is not a requirement document. It's
 412 basically "This group is launching a new system, they need training" in the

413 email. I go to a meeting and listen to what's going on. Listening to their
 414 asking questions to the right people and getting the right information, I pretty
 415 much determine, "Okay this is the system piece and this is a product piece that
 416 we need to teach." The product piece is really a prerequisite piece to the
 417 system piece in order for them to be successful in the system training, they
 418 had to have a good idea what the product is. And that's kind of how this
 419 project was started. I do a project plan so that it keeps me on track. I use our
 420 industry estimators as much as I can because I know that we are doing
 421 eLearning there is extra amount of hours we are going to spend for every hour
 422 of training. Obviously with some projects, especially you have to march in a
 423 very tight deadline ...but I am very realistic. Have been in some situations
 424 recently and throughout my career actually, again I'm really good at talking to
 425 the clients: Within the timeframe we have, here is what we can offer you. If I
 426 had extra amount of time, I can offer you this plus this. So somebody came to
 427 me and said, "Well, we got the system and it's not developed yet, and we need
 428 training, we need eLearning in two weeks". "In two weeks, here is what I can
 429 offer you. However if I have more time I could do this this and this". So I
 430 mean realistically speaking, I feel that in my particular role in this particular
 431 company as an instructional designer, I'm successful because I'm seasoned
 432 enough to manage expectations along with the design and development of the
 433 training. There is not a lot of support from our hierarchy on managing
 434 expectations. Just to give you an example, two my colleagues had a project
 435 that really got out of hand. I was not close enough to be able to tell you if it
 436 was the scope was just too big for the resources and that amount of time or if
 437 they weren't working as efficiently as somebody else might have, but I can
 438 tell you that our chief learning officer had to get involved which to me that's
 439 not a good thing if a project blew up so much that they had to get involved at
 440 that level. From what I understand, lots of hands were involved in this project
 441 touched a lot across the areas so I think in the beginning the scope was not
 442 managed well and in my opinion that was something that kind of goes beyond
 443 what an instructional designer should have managed alone, just by definition.
 444 The people and the management role was supposed to oversee that. So I think
 445 there were some mistakes to be made, to be honest.

446 Q11div What event/communication indicated the completion of the project?

447 A11div I actually had a wrap up meeting at the end just kind of summarized the
 448 timeframe, what we delivered and you know just basically let them know that
 449 we were officially done with this project. But obviously if there is question,
 450 support you need, please let at snow. So there was actually a formal project
 451 summarize document I produced and submitted to the key stakeholders.

452 Q11dv What was your role in the project?

453 A11dv Project manager, designer and developer.

454 Q11dvi What software and services were used?

455 A11dvi Lectora I used a lot. YYYYYY I have used. YYYYYY is a proprietary software.
 456 They actually used it internally and it was available to us since we did not
 457 have Camtasia or Captivate. It had a software simulation capability, so it's not
 458 great but it's better than screenshots and callouts. Those were the two major

459 ones that I used and I'm not talking about Microsoft Office, of course I use
460 Microsoft Office. We have Captivate but I haven't really used it extensively
461 at this company. I have used in the past. So Lectora was the big one for them.
462 I used SnagIt, I used Paint. SnagIt editor did a lot of screen manipulation, so I
463 used a lot. I don't have Photoshop, our graphic specialist does not have
464 Photoshop yet, I know it's kind of a low ramp. It's kind of limiting our
465 graphic ... And sometimes I saw images I want, I might able to SnagIt and to
466 clean it up. But as I said it's not great. And the industry that I have done most
467 of my design and development, it's been sufficient. Most of the time if we had
468 branched out and do more customer service training, we would need a little bit
469 more original graphics, I think. No Flash. We don't have any audio software.
470 Recording studio is something we could schedule to use. The department has
471 worked with vendors outside, even to do the development, I haven't though.

472 Q11dvii What hardware and devices were used?
473 A11dvii PC is only hardware where used pretty much. And occasionally audio studio.

474 Q11e What were the outstanding features of this project?
475 A11e That it was big. It touched a wide range of audience. That it was completed
476 in the timeframe allowed it. Like I said there were issues with the system
477 when there is a system training you kind of need a system available. I was
478 working with quite a few different people whom I had opinions and ideas
479 about what needs to be done. So I was able to target with what's the audience
480 needs to know versus peripheral things that will be nice to know but weren't
481 essential to do the job. I didn't really have benefited of having the people
482 bouncing ideas off the peers. It was pretty much hit the floor running, sank or
483 swam. So for what was worth, I don't necessarily think that's the best way to
484 do it because I think the collaboration was the positive thing. It increases
485 widely the success and improves the product, but I'm really proud of that
486 project because like I said within a short timeframe got it done , happy clients,
487 heard audience learned what they need to learn, as far as I can tell.

488 Q11f Did it occur to you that you wish to have done the project differently?
489 A11f I think that if, well there is something I could control but if I had had the
490 Captivate at the time, I think we would not have to come up with that work
491 around where they did record the live meeting I think that it would run more
492 on our system because YYYYY had some auditing things behind the thing
493 that made it a little different. I think Captivate would be a better tool. There
494 were some sizing issues related to the graphics that could be enhanced with
495 the different software. Ah... things I would have done differently.... As the
496 instructional designer, there's really...I mean if I thought really really hard, I
497 could have come up with something but there's nothing that jumps out to me
498 as lessons learned related to the content itself. I can tell you we had a separate
499 team that assigns to the treating and the learning management system and the
500 working with that team sometimes was a little unique because, I guess, in my
501 mind my role as designer and developer is clear, sometimes I think there is
502 ambiguity in other people's mind, because maybe they function in such a way
503 that for example, if I have worked with a team and we have come up with
504 design and we get to the point when it was time to assign to the LMS, well

505 the other LMS team does not really have the stake in the content, their role is
 506 to get it into LMS. And so if they make a suggestion, I may hear it and let
 507 them know I heard you. But this decision has been made and this is why. It
 508 can be tricky, I think, when you were working with people who on the
 509 change and who don't have the wealth of experience in that particular field,
 510 their expertise maybe isn't about getting the job done and did efficient and
 511 effective. It's more so about this has always been how we've done things.
 512 Mitigating that, for me it's really not a problem to mitigate it, but people are
 513 people and sometimes people don't like changes. Some people don't like to
 514 see things being done efficiently because it bothered them, right, the ideas that
 515 their professional field as well as the credential plus experience were
 516 threatened to some people, sometimes you are underappreciated. So I don't
 517 have a lot regrets related to the role and performing now, but I learned a lot of
 518 things over the year through making mistakes through you know na ïvet é And
 519 I kind of take that lessons and now I learned my lesson from certain things –
 520 certain things you know that I would do much better now than five years ago
 521 or 10 years ago.

522 Q11g What were the solution(s) to the challenge(s)?

523 A11g If I am working on a team and my role is to do the training, I have a
 524 consultative approach. I respect the expertise that all the people involved
 525 bring to the table. I don't try to prove "I know all this about the training and
 526 dah dah dah dah dah". I try to bring people on board and make them feel that
 527 we are working together. And generally with customers, that's a very
 528 successful approach. So in that respect I feel like it's usually a pretty good
 529 situation. It's binding. When you work in that department where skill levels
 530 were all over the place because some of the various things that make you
 531 affective with the customer don't necessarily make you popular with peers.

532 Q12a What specific knowledge, concepts, and ideas that helped you?

533 A12a I think for me hitting the grass for adult learning theory helps understanding
 534 that adults are really big and what's in it for me, and they not just wasting their
 535 time with training. They wanted to affect their job and they want to be
 536 relevant to them. I tend to lean toward the constructivist view of learning, I
 537 don't think there were empty vessels to pour things. I very much think that
 538 when it comes to adults, the connection they make to things they've already
 539 known is very helpful, that I can connect to something they are doing in their
 540 job that I try to teach them helps transferring the knowledge. That's one of the
 541 big ones for me. Attention span and not overloading them. I've seen some
 542 eLearning and for job aids for that matter, there are eye charts. I'm thinking
 543 people scanned the window when they look at the Internet. You cannot load
 544 the page with words and content. You cannot try to teach 10 things in one-
 545 page. So I keep cognitive overload in the mind. When I'm doing any type of
 546 training, that especially with the web, because the audience is not even
 547 looking at it like they are looking at a book or manual, so those are the big
 548 ones. The tone, that I take, whether it is using active voice and trying to
 549 personalize it, or whether it is using a graphic that's representative that
 550 supports what they are learning, because I think multimedia really should

551 support learning. I don't really use a lot of eye candy, a lot of spinning and
 552 moving on the page just for the sake of doing it. I actually had colleges who
 553 tend to disagree, but usually those were the people who don't understand how
 554 we learn how things can actually be distracting. And reinforcing what I've
 555 taught with activities, give them a chance to apply the knowledge, and I don't
 556 mean just multiple-choice, I do short essays and things like that. Those are
 557 some of the big ones for me.

558 Q12b What soft skills did you use?

559 A12b Consulting and good communication, keeping people in the loop, being very
 560 approachable, being very collaborative, letting people know that I am there
 561 assisting them and helping them. And somebody maybe talk to me about
 562 something and I may know it doesn't make a whole lot of sense. In my mind,
 563 I might be thinking that's just not going to work. But the talking to them in a
 564 way, "Okay we can consider this, here is the option." Really making people to
 565 feel that I value their contribution. Also letting them to know that I am there
 566 to assist them with the certain set of knowledge and skills and that this aspect
 567 of our project I got it under control, it's been taken care of. You don't have to
 568 trouble yourself, to worry about training because we're here to assist you with
 569 that. Because sometimes you have clients that were used to the situation that
 570 they had to put something together, that they had to figure out on the ...
 571 maybe even they've done the training. So letting them know that time that I
 572 provide the support that is collaborative effort. And being open, positive, I
 573 think all the things making it successful in the field. As for the project
 574 management skill, there has been times when...you see because of the nature
 575 of the way my department runs, there were maybe times I feel there was too
 576 much lag because I worked pretty fast and efficiently and I don't rush, some of
 577 those politics too though you know...if I can develop two courses in the
 578 length of a time it takes a colleague to maybe do half, and if you look at it, it
 579 is like, well, she actually got more she is developed and you still here, I think
 580 sometimes things are assigned based on politics, 'cause like I said, since I've
 581 been there, I just thought about it as I am talking to you, in less than two years
 582 I had like eight major eLearning plus a few small ones, plus coaching an
 583 intern, and I wasn't out on sick leave last year even. So, I mean I have done
 584 quite a bit but to me, if I got to be there, I'm there to do something, I don't just
 585 sit around. So my toolkit, my skills allow me to be efficient. I know that some
 586 people get caught up and they may get stuck in the analysis phase and they
 587 cannot move. I don't have problems working with a little ambiguity as long as
 588 I'm getting information, I'm moving forward. I don't necessarily have to have
 589 all the pieces of the puzzle to move. But we were trained that way. Without
 590 the training, I can see where it can be a problem.

591 Q12c What hard skills did you use?

592 A12c Like you said writing, learning the software you are training, using the
 593 software to develop. Yeah definitely presentation skills. Well, definitely the
 594 ability to learn the new systems. There was always training, the ability to
 595 learn new information, being a quick study I guess. I think you learn what
 596 you needed as you go.

- 597 Q12d What attitude did you realize that was helpful for the success of this project?
 598 A12d Being open minded, being engaging. Flexible, confident, confident without
 599 being arrogant.
- 600 Q13 Which year was the project? What do you wish to have known that you didn't
 601 know back then?
- 602 A13 2010. Since it was so recent, I cannot really think of anything that I didn't
 603 know back that time. The only thing that bugs me about this particular project
 604 is that since it was eLearning, the fact that we had to have a standup trainer
 605 involved was troubling, but again because of the nature it was not something I
 606 can change, it's an environment thing.
- 607 Q14 What are the other knowledge, skills or attitude which were not used in the
 608 above project but you used in other Web Based Instruction projects you led?
- 609 A14 We talked about it a lot... See that's just the ... If I had talked about a project
 610 from the past, there is probably a lot that have told you that project could be
 611 improved upon. Since I have talked about to you recent, I almost felt that I
 612 used the resources that I have had to the best of my ability.
- 613 Q15 Assuming you are hiring a person as a beginning instructional designer in
 614 Web Based Instruction, what skills are you expecting?
- 615 A15 I would expect them to have what I call a standard instructional design
 616 process, ADDIE probably, because that's kind of our standard process. I
 617 would expect them to have good communication and writing skills. I would
 618 expect them to have knowledge of Captivate, Lectora or some of those tools
 619 like that, or Articulate. I wouldn't necessarily to have them to have them all
 620 but at least one of those. Honestly, I think, because this is because I see things
 621 both ways I lean toward... I would expect them to have a bachelor degree in
 622 the related field. I don't want somebody who just falls into a position because
 623 they've been there for a long time and I see that I see there's a problem with
 624 that.
- 625 Q16 Assuming you are hiring a person as an experienced instructional designer in
 626 Web Based Instruction, what skills are you expecting?
- 627 A16 All of the things I mentioned before, plus several years of experience,
 628 experiences in designing and developing using tools like Lectora, Captivate
 629 and maybe Flash. I know people used to use a lot of Flash and stuff in the
 630 past, but... they would have to be experts of those tools because the industry
 631 has changed, but I would expect them to have experience... They would have
 632 to in the interview convince me that they had the business acumen that they
 633 knew how to consult the client, and they knew how to outcome the obstacles
 634 and have a plan B, and definitely at least a bachelor's degree and or a proving
 635 track of record. Ah...without the education 10 years. With the education I
 636 would say 4 to 5 at least.
- 637 Q17 Which direction do you see Web Based Instruction is heading to?
- 638 A17 I think what I'm seeing is that they are looking for instructional designer to be
 639 a designer and developer, very much so the days of the hard coding Flash
 640 developers I think are starting to go away. I think that you need to have
 641 project management skills because these things getting leaner and meaner. I
 642 think people are realizing that in some cases because I have been with

643 organizations that are realizing that the big top heavy or middle heavy maybe,
 644 their people in those roles are not adding much value because I think most
 645 instructional designers were successful are very self-directed and very much
 646 have to manage the tasks that they are doing. So I think that understanding
 647 that this is the profession and there is art and science to it, I think that's kind of
 648 what the industry is heading. I think there is always somewhat blended, I
 649 don't think we would to purely eLearning. I also don't think that people are
 650 going to go back as much to the classroom training as it has been in the past. I
 651 think there will be a blend, and I think people who are able to work with the
 652 blended solution and to use the technology work across geographies are the
 653 ones to be most successful. As matter of fact, have I ever had a situation
 654 where all of my audience were just in Michigan? It's very rare. And even
 655 when I was working at a law firm, we had a couple offices outside Michigan
 656 so I've never really served to just like a small in-house group, it's usually
 657 pretty broad. I was taught as a young professional the importance of cultural
 658 diversity and realizing that, for example, maybe some of the idioms were used
 659 in American aren't appropriate to incorporate in training. One of my early
 660 companies actually had a course they designed that we had to take global
 661 English. One of those examples was when General Motors sold a car in Spain
 662 called Nova, when Nova means "Doesn't go" in Spanish. So something to
 663 think about. You want to call a car nova, which means doesn't go? So, things
 664 like that. I was actually one of my early companies was a very, very good
 665 learning ground, I haven't dealt a lot internationally as a trainer but I worked
 666 with audiences who have backgrounds that runs again and one of my research
 667 specialty is actually diversity. And actually I wrote a chapter for textbook on
 668 diversity this year. So for me as a training professional it's something I
 669 consider. I know there's diversity preference and learning style. Anything
 670 from time management to, you know, eye contact, communication styles. So
 671 those of the things I keep in mind. It's not the easiest thing in in the world to
 672 take when you are writing, it takes into account certain things like Nova
 673 example. But when you are dealing with audiences in eLearning, when
 674 something is written, you can be interpreted in different ways, you don't have
 675 that immediate feedback, whereas in classroom there were facial expressions,
 676 that look of "I am not sure", the things you can talk out. So in that sense, we
 677 are at a disadvantage when we have an asynchronous learning. That's just
 678 kind of nature of it. And we try to do things to make it neutral. But
 679 sometimes neutral doesn't touch everybody. So that's one of the reasons why I
 680 don't think the class room training would ever go away totally even if it is all
 681 WebEx, even if it's all virtual, we are not all together in a classroom, which to
 682 some extent we still do that too, it may not be as broad. So I am excited
 683 about the future of the industry, I'm cautious though, because we tend to be
 684 the first thing that's cut in times of trouble. I know myself, my own income
 685 my salary has decreased as my skill set, education increased. So you know it's
 686 not the easiest field but it's rewarding for me.

687 Q18 What do you think an instructional designer should do in order to keep up
 688 with this direction?

- 689 A18 I think that we should be involved in the professional organizations. I think
 690 we should weave in researches, you know, as we should be in the position to
 691 educate ourselves. I can feel it in this field if you're given an opportunity to
 692 go back, it helps to be educated to be an expert. I think all of the things really
 693 validate what we do. Just like you wouldn't want to a lawyer litigating who
 694 didn't have any professional background, same kind of thing. Actually, I am a
 695 board member of GDASTD, I participated ISPI. I'm not as active but I do
 696 participate. And I belong to lots of blogs such as eLearning blogs. Lots of
 697 things like that. And in groups at LinkedIn, professional chats, networking I
 698 do a lot of that. So I try to keep informed in that respect. I think that's
 699 important to be connected.
- 700 Q19 Anything else that was not covered in our conversation but you think is
 701 important?
- 702 A19 I do think that there's definitely a difference between training professionals
 703 who are skilled depending on background and people who just falling to
 704 positions maybe they have been around for a couple of years and they were
 705 put into the position, I think there's definitely a different approach, different
 706 success rate, and I really appreciate when I see a person who has credential
 707 and experience behind them who can collaborate with you because the
 708 differences are obvious. I do agree we need some formal education. Actually,
 709 at one point I got sponsorship, but I took some time off to finish because I was
 710 at the point that if I didn't, I wouldn't finish. So that was really important for
 711 me to finish so I took the opportunity of substituting teaching for a while
 712 which was really really flexible. And I did a graduate assistantship, and that
 713 was interesting. That actually gave me opportunity to do some writing and
 714 really proud of getting published at this stage this level. So that's good. 'Coz
 715 this is not an easy field to me, it's an interesting one. So we will see.

1

Transcription of Interview 006

2 Q1 Good Evening, thanks for taking time with me. Can you tell me your current
3 job title?

4 A1 Yes, at this point I am not currently working, however a few months ago I was
5 a principal training and development specialist.

6 Q2 How long have you been working in the current position?

7 A2 For five years, just short for five years.

8 Q3 What's your age range: 25-35, 36-45, 46-55, and 56 above?

9 A3 56 and above, as of December.

10 Q4 Would you say you are actively involved in instructional design?

11 A4 Absolutely yes. As I said just a few months ago I had been employed as an
12 instructional designers for about 20 years, 15 of them were in automotive
13 industry. And I also have remained active in professional organizations. I
14 have just completed a term as a Vice President in Communications for
15 international AECT. And I am also a member of Michigan chapter AECT.
16 And I attended other groups, such as ISPI and ASTD.

17 Q5 Are there any other positions have you held before, that were related with
18 instructional design?

19 A5 20 years.

20 Q6 How many years accumulatively do you estimate you have worked in
21 design/development for WBI?

22 A6 In web based training, I have been involved in web based training probably
23 since 2000 so I would say 11 years. I think that's when technology finally got
24 easier to work with. And Authorware had evolved into something much
25 easier to use. And I think corporations started to believe in that about that
26 time.

27 Q7 In those WBI projects, how many years accumulatively do you estimate have
28 served as a lead instruction designer/developer?

29 A7 Oh, alright, let me see probably, I would say from probably 2002 through
30 2011, so about nine years.

31 Q8a What's the major of your bachelor's degree

32 A8a My bachelor's degree was in English and history from Michigan State.

33 Q8b Did you have postgraduate education: Master's, or Ph.D.?

34 A8b My Master's degree was actually in healthcare administration from BYU,
35 Brigham Young University. My PhD was instructional Design from Wayne
36 State University.

37 Q8c Have you had any other training on instructional design?

38 A8c Other than the degrees I think that the doctorate was probably all in
39 incumbency. When I was in AAAAAAAAAA, they would offer us periodic
40 seminars that they would bring in house... different experts in the field, I
41 remember, David Jonathan came in, John's ARCS's model from Florida
42 State... I'm blanking his last name, kind of a lot of big guns would come in to
43 do seminars for us on their areas of their expertise in instructional design,
44 John Keller, that's who it is.

- 45 Q9 What's the business nature of your current organization: business/industry,
46 education, government/military, health care, independent, other?
- 47 A9 Most of our work were for outside clients. We do have a branch in our Dallas
48 office to develop internal training, our security training that type of thing. But
49 no, most of the businesses were for internal clients. And GGG is the biggest
50 client, NNNNN was one of the biggest healthcare, they had a huge contract
51 with aviation association. We did a big contract for a military in United
52 Kingdom. That it was a project that went for a couple of years we actually
53 had a team in Britain doing that. And also we have been doing... we rolled
54 out 300 course curriculum for a technical institute based in United States to
55 train automotive technicians. So this is really a multi-setting business.
- 56 Q10 What's the estimated size of the organization you are working for?
- 57 A10 I want to say when business was really good, we were probably in the Troy
58 office 400 people and another team based on Dallas... I would say our
59 business around 1000 in total.
- 60 Q11 Can you tell me a Web Based Instruction project you are very proud of or got
61 highly recognized?
- 62 A11. I think I was the lead, one of our healthcare clients wanted us to develop a
63 new website, it was their training database. They developed an entire website
64 through which they would do registration training registration that type of
65 thing. So it was a big software project. It was a newly developed software
66 and our company was to develop the training for that software for web-based
67 training.
- 68 Q11a How many team members in the project?
- 69 A11a It's just me and another developer, an excellent developer. You know what, I
70 would take that back. I was a lead for the project, S was our lead developer.
71 And we also always worked with a graphic artist. There was a media
72 developer that developed all our Flash, and we would always had ...there was
73 outside team we would bring in, we would bring in outside talent, each screen
74 would have voice over associated, so there was actually outside talent. Plus
75 we also had in house audio team where we had audio technicians who would
76 recorded. And then after that, because this is a web based after the
77 instructional designer, the media developer, the graphic artist, the audio...after
78 all of that work was married, a course was loaded into LCMS. And then after
79 we published out the course, we would've of course... Once the course was
80 completed and published, we would go through and proof read and do quality
81 assurance. But then there was also in our office was a test lab, and those
82 people what they would do ...we would give them a course, they would load
83 it up to a prototype LMS. And they would take the course and we would
84 receive a quality report back. So that was very complete. Yes this one we
85 would have WebEx conferences with our clients... For this client, there were
86 several SMEs. There was actually an in house person who was able to
87 provide a lot of the content to us, but then we would have...after the interview
88 with T, and obtained content... the initial interviews with T, that was our
89 analysis. Then we put together a design document screen by screen how we
90 anticipated the course and then we went to the client, and they had a team, I

- 91 want to say two or three people who would attack the submitted document,
 92 and it was their job to provide revisions to the design and doing signoff. So I
 93 would say that was probably four subject matter experts. That was me who
 94 was doing project management.
- 95 Q11b How long did it last?
 96 A11b It was very, very fast. Probably the course, I want to say probably 45 minutes
 97 long. It was a smaller course by the company standards, they used to do a
 98 three-hour WBTs, which I don't think that was wise. But this course was
 99 about 45 minutes. And we were charged to have it live within four weeks,
 100 from beginning to end. That was what the client was initially demanding.
 101 However, the client, fortunately for us, the clients software development team
 102 delayed so the course I think in its entirety all the way through our process
 103 loading it to live, I believe we had it completed in six weeks. And this was
 104 my experience with software training is that although the clients wants the
 105 training development as the software has been developed, and they keep
 106 changing it and usually delayed, and that's what it happened.
- 107 Q11c What was the project about, was it about how to complete a step, process, use
 108 systems, or how to perform physical jobs, or change attitude/value?
 109 A11c It's about a software system
- 110 Q11di Describe the project in a very high level (the process by stages)
 111 A11di When I led a project, I pretty much tend to follow ADDIE model.
 112 Understanding that it is iterative, that you never ever through with analysis
 113 and design, you know, there is always more revision to do. But yes okay the
 114 process we followed, after I was given the assignment after the team members
 115 were assigned to me, then I met with the in house SME, who was also the
 116 client interface, she worked with the client in a daily bases. And basically we
 117 had a few analysis meetings with her, to understand from T exactly what the
 118 client wanted. For analysis, I always asked at the end of the this learning
 119 experience, what the people is supposed to know or do. And so I just let T
 120 started talking, okay people need to know or do at the end of this experience.
 121 She talked for a while, I was able to identify the basic categories of
 122 information, which then became the modules...yes you know. So we
 123 identified the basic categories which were modules, and we started drilling
 124 down. She was able to show us the prototype software. We just based on the
 125 each categories of information, registration...I don't remember what exactly
 126 the content was, say it was the registration of the students was in one module,
 127 then we went screen by screen through the registration process. We kind of
 128 flowcharted the process, identified the screens we would want to train, and
 129 then we started talking about the interactivities we wanted on each screen.
 130 We...it was a toss of between using Captivate or using Flash to teach the
 131 screens. We were led to go with Flash because we were in such tight
 132 timeframe, our media people...it was easier to pull one of them in, storyboard
 133 out the Flash and do it that way. So I guess uh...we combined analysis and
 134 design, was just iterative. Yeah, you know how it go, you get your basic
 135 categories, see if your client likes it, then revise the design document, send it
 136 back, and then we make sure we had an official sign-off from the client on the

137 design before the actual storyboard...I think we might start storyboarding
 138 without the design, but we sure we didn't start Flash development without the
 139 final sign-off. Yes, they did review the storyboarding, the storyboarding was
 140 very easy because our design document was so complete. So storyboarding
 141 was fine. This project had a little complexity to it, I might said it's easier to
 142 use our LCMS. For this one, we didn't. XX has a ...I call it factory model of
 143 instructional design, meaning it is very lock step and everybody on the team
 144 knows exactly what their role is because we've done it so many times.
 145 Personally I do not like it because it prohibits creativity. It does not always
 146 meet the customers' needs, I don't think very well. However, that's the way
 147 that XX sells projects to customers. This customer said No, we do not want to
 148 develop using your LCMS, we want you to use Lectora. Well, the only person
 149 in the office who even knew how to develop using Lectora was S, our
 150 developer. So a lot of nicety in our LCMA weren't in Lectora. For our
 151 projects in the XX's LCMS, we have...there were ten different screen designs
 152 were preprogrammed, exactly where the text and graphics would go, there
 153 were different templates you can choose. None of that were available to us in
 154 Lectora. We also had standard toolbar at the bottom to provide all your
 155 navigation, forward, backward, refresh, glossary, we always had a pop up box
 156 with narration text. None of that were available to us. So another caviar of this
 157 project was ...thanks heaven, S was as wonderful as she was, she had to work
 158 with programmers and graphic designers to program Lectora to meet the
 159 customer requirements. So in addition to storyboard original content, we had
 160 to present the client with our vision of what the Lectora functionality would
 161 be. So it was like a prototype presented to the client. The way our storyboards
 162 were organized is that the very top was a lot of metadata that went with every
 163 screen, screen name we went to know where the content from, so just the
 164 metadata was at the top, then you had the actual screen would look like...
 165 there was usually a mockup of graphics, the actual text would be there and
 166 then below and the bottom third of the storyboard was the narration text, so
 167 the client would ... you know, sign off all the audio, but we never but all
 168 audio was generally not recorded until the course development was complete.
 169 It was just, you know, and the reason for that was in this particular project we
 170 always wanted the client sign off on the text and visuals before we recorded
 171 the audio because it was really expensive if they changed any of the text and
 172 that we would have to bring our talent back and re-record the things. So we
 173 know audio was never done until the client said "I had signed off on the actual
 174 course, if you will". I mean we would put it in the LMS so the client would
 175 see the course without the audio so they can do their final review. S then
 176 made adjustments and then the audio was recorded. In this course you know
 177 we asked the client about the evaluation and they said because this is more
 178 informational, no, we didn't have... we didn't do your objectives, multiple-
 179 choice, true-false, quiz anything. We did put some activities in the course. At
 180 the end of every module, there was application of that activities, Flash based,
 181 where the learners could try the process that had just been explained to them
 182 and that they would receive feedback if they didn't do the process correctly,

183 they were redirected to read one more time and try. But no, on this particular
 184 project, there was no official assessment which was very unusual. Every other
 185 project I worked on, there was official learner assessment that it was actually
 186 recorded in the learner's history in the LMS. As far as implementation, a lot of
 187 for XX, a lot of times, we would host the courses for the client. For this
 188 particular client, once the course had gone through our test lab, had been
 189 tested in the LMS, make sure was working properly, then it was delivered to
 190 the client, and they wanted to hose it themselves. So once we were told that it
 191 was running properly in their LMS, we had able to sign off this project and we
 192 would not be responsible. I will say that, because of the contract we had with
 193 this client, part of the XX's responsibility was actually enrolling learners in
 194 the course afterwards, but that was a different team with XX, my team was
 195 done after we were assured the course was running properly in the LMS. .

196 Q11dii Describe the project in as much low level (steps, tasks) as possible
 197 A11dii After we were given the assignment, the first thing I did was S and I met with
 198 our internal client, went with our analysis and design. After we had an idea
 199 for what the course, what the design was to look like, what the graphic
 200 demands were going to be as far as Flash, and also doing some programming
 201 within Lectora. Once S and I had an idea of that, then we immediately
 202 involved our media experts. I, as a project lead, contacted the media manager
 203 and to kick off the media part of the project, then that manager assigned the
 204 graphic artists/programmer who would work with us. And we had a meeting,
 205 we talked about timeline, we talked about requirements with the deliverables,
 206 when we need the deliverables from the graphic team. So that was put into
 207 place. And also, once when we knew actually timeline, I met with the audio
 208 visual manager to let him know the approximate date that I would want to
 209 record this and when I was going to need the audio file processed. And also,
 210 we always ...I had a meeting with the manager of the test lab, to let him know
 211 when the course would be coming for testing and he's going to test it fast.
 212 There would be no...I just let him know that you have to turn this around in
 213 72 hours because the test lab, it was rigorous you know, we would submit test,
 214 they would load into LMS. They would click through, give the discrepancy
 215 report, come back to us, we would do the fixes, send back to them and then
 216 inevitably even if we have corrected all the discrepancies they initially gave
 217 us, they always found things they want to tweak. So I met with manager of
 218 the test lab, letting him know you have got 72 hours to get it done, just so they
 219 know. So that was sort of the positioning the team letting the instructional
 220 designers knew the project plan, and once out, then we met the graphic
 221 designer, she herself sat down with her media developer, and they worked out
 222 how they were going to work together, and I kind of stepped back, because
 223 they were an experienced team, I would be in their way, so it was...so S and R
 224 were designing, developing, programming doing what they need to do. And
 225 then ... We did have... because this project was in such a rigorous timeline,
 226 we probably met at least with S and R, the media developer, probably twice a
 227 week just to check in and see how the project was moving. And a lot of time

- 228 of those were informal meetings, I might just pop in, call just to make sure we
 229 were doing okay.
- 230 Q11diii What event/communication marked the beginning of the project?
 231 A11diii First with our internal account manager T. I believe I may have met with T, no
 232 I... included S, I wanted S to hear everything from absolutely beginning. So I
 233 did bring her to the first meeting.
- 234 Q11div What event/communication indicated the completion of the project?
 235 A11div Well, we knew the course was completed, after it has passed the test lab's
 236 review. Once we knew it was technically sound, that all errors, the
 237 development errors, the misspelling, graphics that weren't working. Once we
 238 knew we had a really sound course, then the client...then we hosted and put it
 239 up in LMS. I was able to get the client access to the LMS. So the client
 240 clicked through the course. Then I don't think after the client clicked through
 241 it they required any revisions. So once they have signed off and accepted the
 242 course, then we...I didn't actually have to do it, there were something done by
 243 our test lab people. They were the one that did the technical handover. I don't
 244 know how they did the final transaction of the course from XX's test LMS to
 245 the client LMS. I don't know if there were some, if they used some protocols
 246 or just FTP the course to the client. I was making sure the project was
 247 completed, absolutely. I was on the phone to make sure, you know, "Have
 248 you posted the course, does the client have the course". Then I talked with T,
 249 "Does the client have the course up running on their LMS, is it working". So
 250 I was the one following up on it until I was told that the course was
 251 functioning on the client LMS. That's when the job was over.
- 252 Q11dv What was your role in the project?
 253 A11dv What I had was my managing gave me the project, a budget, yes I received a
 254 budget and the way the budget works in XX, sometimes you know the
 255 financial amount but the more important thing was how many hours can be
 256 spent on any part of the project. What I always did was my in-flight sheet. It
 257 was, I can show you, sometimes I would do a Microsoft Project plan, but this
 258 was so fast it wasn't worth doing in Microsoft Project, we just had every step
 259 of instructional design process including the media and development
 260 including the graphic development and I just had dates who was involved and
 261 how many hours each person had it to their work. I just mapped out in the
 262 Excel spreadsheet, gave it to every team member and basically said, let me
 263 know if you think if you run into something you think your hours is going to
 264 go over so that I can explain this. Because again I was working with great
 265 people, I don't have to worry that they were going to fail because of lack of
 266 knowledge or skills or just goofing off. If they told me the hours, they need
 267 more hours, I knew it would be legitimate reason. So basically my first role
 268 was to budgetary let everybody know that hours, to map out the timeline, and
 269 to check in. And I also... was the interface between the whole instructional
 270 design team and the client. My first point of the contact was the client, the in-
 271 house account manage. And I was checking in regularly with T, to let her
 272 know the project, I would let her know when S the instructional designer
 273 needed an additional client meeting or clarification. Because sometimes this

274 client was not...there was a little bit of confusion, it was pretty typical in the
 275 client world I would say... There were some disagreements, the client within
 276 themselves back in Boston sometimes would be fighting you know about the
 277 course content should be. So, I first would talk to T the account manager. T
 278 would either talk with the client obtaining the information we needed. And
 279 when necessary, S and I would have WebEx conferences with the client to
 280 discuss issues so we can keep the project moving along. So I was kind of
 281 facilitating that role. And then I guess, besides making keeping making sure
 282 that S and R were moving along nicely, I also dealt...when it was the time
 283 with the audio folks, I scheduled...I preferred all of my instructional design
 284 projects to schedule the audio talent myself because I want to know when
 285 exactly he was coming and exactly how much he took. I don't want to trust
 286 my budge to my other people. So I scheduled the audio talent and then made
 287 arrangement with the audio manager when his team is coming, I try to keep
 288 very tight hold of the budget, because in XX it is very difficult for leads who
 289 were not...it's tough if you don't hold to your budget. So I took care of that.
 290 Then again probably a week before we need the test lab, their service went
 291 very quickly, I checked in with the manager to make sure their people was
 292 available. So basically just to keep in touch with everyone. You know the
 293 management stuff. What I loved on their project was design, because I was the
 294 lead and the designer. I was the one who led the analysis meetings, I was the
 295 one you know who put the design together, with a lot of S's input, because S
 296 is quite frankly much better than I am technically, she knew a lot of things
 297 about Lectora that we needed to take into account. And yes I did get to lead
 298 instructional...doing the analysis and design, and I was quite happy to turn it
 299 over to development to someone else. Yes, S did the storyboard and I
 300 provided the content outline. We did quite intensive design document,
 301 basically we had every scene outlined. For each screen what we had was what
 302 the content would be, we jotted down what the visuals would be, what the
 303 graphics would be, and we also jotted down any interactivity we would want.
 304 So that was the details of the design the client signed off on, just screen by
 305 screen – you know, content, graphic and interactivity. And then once we had it
 306 signed off, I gave it to S, the magic happened. So the design was pretty much
 307 in great details, in that way the client couldn't come back and say, we don't
 308 like this. We would say, "Well, this is what you agreed to." This is part of the
 309 client management. I don't think this client actually wanted revision, what
 310 they had wanted was to deviate very much from the design document. Then
 311 you get into the cost conversation. Once the design has been signed off by the
 312 client, then I would just more coordinate, making sure the dance was smooth
 313 between the team members. Actually this is a very delightful team to work
 314 with, really good people. Other projects I had, we had multiple courses with
 315 multiple developers, but this one was really a nice project. That's why I want
 316 to describe to you.

317 Q11dvi What software and services were used?
 318 A11dvi Lectora was the course content software, Flash. The audio guys... There was
 319 specific software they used when they were processing the audio files. I am

320 sorry, it's not Audacity, something that is used in professional studios and I
 321 don't know the name of it. Those probably were the big things, like Lectora,
 322 whatever the software was used for audio. We didn't shoot any videos with
 323 this. We elected not to use video. Normally with this type of training we
 324 would use Camtasia or Captivate. But we decided not to because the timeline
 325 was too tight. And then with the basic analysis and design we just used Words
 326 and the PowerPoint, yeah we storyboarded in PowerPoint. We used outside
 327 professional servers for the audios. Oh one of the little small software we
 328 used was SnagIt.

329 Q11dvii What hardware and devices were used?

330 A11dvii Just our laptops. Again the audio we had an entire audio studio in that
 331 building. So the instructional designer was using her laptop, the media
 332 programmer, media person, was just used his laptop you know, it was
 333 appropriate for Flash development. The audio folks had the entire sound
 334 studio with everything they needed. And our test lab had a LMS to host our
 335 course on. I think our LMS was more mainframe because it hosts a whole lot
 336 of the courses for other clients.

337 Q11e What were the outstanding features of this project?

338 A11e I think we did... we meaning primarily T, S and I did a really... I think with
 339 any instructional design project, a good, solid analysis and design is the heart
 340 of it. If you can really nail your analysis and design and understand the
 341 content, the interactivity needed, normally we would be a lot stronger in the
 342 evaluation, but the client didn't want it. But if you can get a really good
 343 analysis and design, the project would flow well. So I think this was one thing
 344 we did really well. Again on this project we were fortunate enough to have, I
 345 would say, the cream of the crops as far as developers - we had a super
 346 instructional designer, a super media person, and great audio. And that was of
 347 course not the case with any course development, not as in any company. This
 348 is super I think is because of the importance of this project. This was kind of
 349 our showcase piece for the client, also to gain more business. So they put
 350 really proficient people on the project, they made a lot of fun, everybody had
 351 the right skills, both as far as solid instructional design skills, knowing the
 352 theories as well as appropriate practices. Our media person had a really good
 353 feel for how to develop within Flash to properly present the screens. I think
 354 another thing that made it a really good project was because of the
 355 cooperation and the continuing conversation with the clients, even though the
 356 clients had some disputes among themselves, our interactions were pretty
 357 clean. The client was pretty cooperative, giving us what we needed. And we
 358 turned things around to them in a timely manner. Basically we were on time
 359 on budget. It was a pretty nice course, it was pretty, good professional
 360 looking. And fun too. The interactive exercises we had to reinforce things, I
 361 can't remember the specific names, but they were not the usual drag and drop,
 362 multiple choices, filling the blanks. They were more using the software
 363 interacting with the screens, clicking on things and things would happen to
 364 simulate. I guess that was the nice thing, some of the activities were
 365 simulating how the system would work. I want to say S's background has a

366 bachelor from UU I believe it is called Training and Development. She was
 367 graduated from UU, I don't believe she had started her Master's degree at that
 368 time. Her knowledge on instructional design really helped when working with
 369 me.

370 Q11f Did it occur to you that you wish to have done the project differently?

371 A11f Yeah, in fact, I was just thinking. S, the developer, was frustrated during the
 372 project because from S's perspective, it wasn't a good instructional design.
 373 But I...but that's always, I think given the constraints the client put on us, as
 374 far as their expectations of how they wanted the final product to look to
 375 operate, the content they wanted, given the constraints out on us by the client,
 376 it was the best instructional design we could have provided. However, could I
 377 have done exactly what I wanted in analysis and design? I would have done it
 378 differently. I think from cognitive perspective, I didn't always... just for
 379 information processing, there could be better ways to organize the information
 380 and present it. But that is not what the client wanted, we couldn't pass that.
 381 And I think that in my experience, my 15-20 years' experience doing this,
 382 that's I always have to make peace with. You know, as a professional, our role
 383 as an instructional designer is to recommend based on everything that
 384 we've...everything theory we've known, we can recommend to the client
 385 what would work. But at the end of day, they are paying, and we do, you do it
 386 in their way. I guess I don't feel badly about it. It's like going to a doctor, the
 387 doctor can tell you to eat less sugar, but then the patient fails the instructions.
 388 Same thing with our client, we can give them our best advice as possible, and
 389 they have to make their choice. And, so I guess as far as the project, I think it
 390 was a really good project, it was decent acceptable instructional design, the
 391 thrilled, but in my heart of hearts, from theoretical and that's the practice, I
 392 know things could have been even better. But, what can you do?

393 Q11g What were the solution(s) to the challenge(s)?

394 A11g Basically let them solve the problem. We identified who was the customer
 395 final sign off was, who was going to write us the check. You know basically I
 396 guess to put it crudely, the person who is paying, as far as I'm concerned, gets
 397 the final say. I mean they are buying in a product and whoever is going to pay
 398 for it, in my estimation is the one who has the final...is the final decision-
 399 making authority. So we identified who the lead client was and then she...we
 400 would basically let her discuss with her team when they would be disagreeing
 401 with each other on the phone and we would just ask when a final decision was
 402 made and if this lead client could let us know what was the final decision and
 403 we would proceed. And yes, they gave us response on time, because they
 404 wanted this training on time. And we made it clear to them, if you don't ...
 405 and we share the project timeline, you know, there was a list of their tasks and
 406 due dates, and there is a list of our tasks and due dates. And if you miss, you
 407 miss, your project is going to be delayed by the number of hours or days that
 408 you delayed because there's no slip, that is no opportunity for slipping in this
 409 project. With other client, that would happen that they do not always follow
 410 your guideline or timeline, there was enough room provided, padding to
 411 accommodate that in the project plan. But for this project, T was really good,

412 the account manager, she just told the client right up front basically your
 413 expectation was unreasonable, we don't develop a 45 minutes course this
 414 fast, so she said "We would do it for you, provided you meet every deadline
 415 too." So you know there's no other way to do it. Yeah, we were feeling a lot
 416 of pressure, I mean S and R, they worked evenings and weekends, but then I
 417 told S if she could do this, I would just give her comp time to make up for her
 418 effort. I talked to R's manager and asked if he could also reward Richards a
 419 couple of days off to make up for this, that helps. Because with such great
 420 team members like S and R, you don't want them to feel being taken
 421 advantage of and look elsewhere for employment. Really you hate to lose
 422 people like them. People like to be treated like human beings. So I always try
 423 to protect team members in that way to make sure they were treated
 424 respectfully and then we never forget that that people are human beings, lives.
 425 And another nice thing we were able to do with this project was XX offers an
 426 award for teams that do well. We were able to nominate every member on the
 427 team for this financial reward. And the office manager did approve them
 428 because we met our commitments and the client was so happy. So people
 429 receive extra money in their paycheck which was nice. S worked exclusively
 430 on this project for five and six weeks, I had other work that I had to work on, I
 431 had other projects going on same time. But S was exclusively on it, our media
 432 developer was not. He was juggling for other clients. But he knew that this
 433 was the priority, he just had to work with his manager. Then the audio team I
 434 knew was not exclusive for this you know we probably only need them for an
 435 hour in order to record them processing. The test lab was never exclusive,
 436 they always have a long list of courses to test for different clients. It was my
 437 job to make sure this project had the priority. A couple of times, the media
 438 developer R came to me and he said, "I have something else I have to do". So
 439 I would talk with his manager and then he was able to juggle assignments in
 440 the media team. So it was my role to be a negotiator, the internal negotiator. I
 441 just make sure the ballet proceeds.

442 Q12a What specific knowledge, concepts, and ideas that helped you?

443 A12a We used the ADDIE model. We tried from cognitive perspective, to really
 444 think through how people would do their work using the software and we try
 445 to explain, teach, display the functionality of the software in logical
 446 progression, so the learner would build the mental models that they would
 447 able to take back and actually use on the job. I mean I was very conscious to
 448 try doing the analysis and the design to design so that the learners would
 449 develop their mental models that would be valid back into in the job. Another
 450 thing, um, I believe is the information processing. I'm a big fan of Gagne's,
 451 quite honestly so it was the idea of presenting information, letting the learners
 452 to interact, to act with it, just trying again try to get the knowledge from the
 453 working memory into the long-term memory by practicing, repeating. This
 454 kind of coming through Gagne's nine steps, if you will, you know, give the
 455 gaining attention, give the objectives, show them how to do it, let them do it.
 456 We really don't have a lot of time to really reinforce too much, they would
 457 have practice exercise, but that is as far as analysis and design, it was kind of

458 going through my mind to help people to build those mental models you know
 459 getting the information from working memory to long-term memory. Other
 460 things that made the project successful was, I think, just a lot of practical
 461 experiences. A had 10 years at YYY, but at this point, this project was done
 462 probably four years into my tenure with XX, so I really knew the company
 463 processes. I knew all the team players as far as the managers three other
 464 managers I had to work with the test lab the media, their corks, corks might be
 465 a bad word, I knew how to work with them to get what I wanted, if you will. I
 466 knew how to pleasantly work with them. So we could mutually accomplish
 467 what we needed to. It was very helpful to know the other managers working
 468 style to know their preferences, how they want to be communicated with. I
 469 also knew both the instructional designers and our assigned, the media
 470 developer, and the audio guys, I have done many many courses with them. So
 471 we kind of.. It was so well orchestrated we just knew how to work with each
 472 other. So from practical experiences, it was very helpful too. And other
 473 things that make this successful was that again S was the only in-house person
 474 how knows well about Lectora. She had had a lot of heartache using Lectora
 475 with another client, so she had learned, she knew exactly what she needed
 476 what is actually needed to be done and she technically ran this show. So that
 477 was very helpful.

478 Q12b What soft skills did you use?

479 A12b Understanding your team members, knowing their styles. And also I am a big
 480 believer in staying in touch. I like to document everything and e-mails. So I
 481 would send a lot of e-mails both in initial e-mails introducing the projects,
 482 then we would have face-to-face meetings. But then I'm just a big believer of
 483 checking in with people and not let things go too long, so e-mails or just
 484 dropping by people's cubicles, instant messages that is acceptable in XX,
 485 picking up the phone. Yes, communication, talk, talk and talk. We didn't
 486 have to do a lot of conflict management. I had to do that on other projects.
 487 This project, fortunately, there was no conflict management I needed to deal
 488 with. I would tell you quite honestly I had to do conflict management on
 489 other projects, sometimes between me on the other managers, just because...
 490 not that we were ugly to each other, but everybody was under so much
 491 pressure that there was a real skill that I had developed. Maybe that is why
 492 this project worked out so well is that I and the audio test lab, the media
 493 manager had been through so many projects together, that we've learned how
 494 to work with each other. I think a soft skill that is really important is just to
 495 respect, just based on human respect, but also respect for the pressures that
 496 other teams are under, and having just to talk and negotiate and compromise
 497 to figure out how we would get this project done, knowing the constraints
 498 everybody was under. The conflict I had before was always about staffing
 499 about resources. No, we never had disputes or discussions about how
 500 tactically a graphic were going to be done, how the audio was going to be
 501 recorded, it was always about staffing. You know, I would come in and
 502 would say, whether they it was an instructional design project or translation
 503 project, "Well I need this, this is my deadline". And we would say "No, we

504 cannot do it. We're too busy". And then he would be, "This is what I need".
 505 And then we just have to figure out how to do it, and especially with audio
 506 people, what we ended up doing was, we had it to work out a compromise -
 507 we would work odd hours. Sometimes we started recording at seven in the
 508 morning, other times we would record in the evenings and on weekends and
 509 just flex people's schedule, like if S had to sit in a recording on a Saturday,
 510 then give her Monday off, so just kind of human respect and also try to be
 511 creative, to figure out how to accomplish the work and then just band the
 512 rules, do what we need to do. Yes, coming with a creative solution.

513 Q12c What hard skills did you use?

514 A12c Writing. I think from analysis and design, being able to ask the correct
 515 questions, to be able to ask those what do we need to be able to know, and do
 516 at the end of it, and to start drilling down once the person, for this particular
 517 course, they need to know how to use the software to register learners. Okay,
 518 then, just drilling down into what's going to be asked, what screens to be used,
 519 technically just ISD skills, I guess, just that drill down analysis, uh design
 520 probably skill there would be visual skills, especially with eLearning just
 521 visually how we were going to present this. So that learners would really
 522 understand. You know which screens we would show and how we would
 523 automate the screens so that learners could interact with them. So you would
 524 need good visual skills and would say some good... for the instructional
 525 designers, we need understanding of what Flash could do and how we would
 526 like the Flash to operate and with our media developer obviously he was...we
 527 would consult with him, "Can you do this for us which in the time we have?"
 528 So we have to know what the software can do and can not do. And if we
 529 don't, we have to ask questions, "Is this design going to be workable?" We
 530 talked about analysis, we talked about visual design, we talked about the
 531 interactivity, understanding software. What else? The hard skills...I think
 532 about the WBT, we need to understand any constraints the LMS will have.
 533 Not for this course, but we did have a course that was designed and developed
 534 in the country but the LMS was not hosted in the United States. That was a
 535 real issue to understand the LMS, yeah, because we had a client to roll out a
 536 Web both in Germany and China, their LMS systems were not compatible
 537 with the way our courses were developed. So we need to ask LMS question
 538 right up front and involved IT if we need to. So that would be another hard
 539 skill. And then I guess this course did not have a lot evaluation in it, but in
 540 general a hard skill, I think assessment writing is a skill itself, to be able to
 541 write a good objectives assessment, and understand how the assessment is fed
 542 into LMS. Probably an important or a skill or something you need to do, is to
 543 talk with the client what kind of information they want LMS collecting on
 544 each learner. And make sure the courses were so designed that it would pass
 545 that information to LMS, you know how many times they are going to allow
 546 the learner to attempt the modules, do they get to retake their quizzes, that
 547 kind of things. We would recommend, but a lot times we asked questions so
 548 they would make the decisions.

549 Q12d What attitude did you realize that was helpful for the success of this project?

- 550 A12d I think during the time that this project was being developed, the economy
551 was very very difficult in Detroit, I think the attitude during the project was
552 just one of the realism... even though it was with a compressed timeframe the
553 attitude had to be that this is a good client, we hope to obtain more business
554 from them, so it is very important that we provide them a good value added
555 product, and even though it was a tough deadline, we are going to do, we are
556 going to do it well, because we all like our job. It is just as critical to bring as
557 much business from this client as could. So I think the attitude is very
558 realistic. We will do what we needed to do to serve the client and hope the
559 client will provide additional business. Again I think on any team, respect is
560 very important. In all I think respect is just a basic human courtesy, but also I
561 think you need to have respect for everyone's talent, I guess what each
562 discipline is bringing to the party if you will. I think there needs to be...I think
563 nobody in any eLearning party knows all can do it all, I think the instructional
564 designer needs to respect as the media developer is telling him/her as far as
565 their recommendation of what or what can not be done in the amount of time
566 allowed, a lot of time the media developer has to respect the designer that
567 there were good reasons why that we requested we were requesting; for the
568 audio people, we need to respect that they have certain requirements as far as
569 the way they run their sessions their expectations because that's what they
570 needed in order to provide real professional sounding voice over. So a human
571 respect, a respect for individual talents, what's people contributing to the
572 project, uh...when possible I think nice to have fun, able to laugh. And also I
573 think ultimately I always think there would be a little bit of joy when you
574 produce something that's really good, so you know, allow that sense of joy to
575 be there, not to be sophisticated excited about what you were doing, because I
576 just think that instructional design is just wonderful, and I think it's nice to
577 keep that sense of joy alive. It is fun, I don't think as an adult we were so
578 sophisticated, we jaded, that we lose that sense of playing.
- 579 Q13 Which year was the project? What do you wish to have known that you didn't
580 know back then?
- 581 A13 Summer of 2010 I believe. Well, I tell you, technically, I just said before that
582 we should have a good understanding of LMS, I wish I had known more about
583 the client's LMS, I think that had I done some upfront research and asked a
584 few question upfront about the requirements about their LMS, that might help
585 shape the eLearning design a little bit better. The one thing it's usually
586 impossible with software training is that...I wish I could really see the
587 finished software myself, that would be just huge to be working with the final
588 product rather than with the software prototype that we had to guess so much.
589 We had screenshots of prototype screens that the graphic artists was working
590 off of, to develop the interactivities, and then we obtained the final
591 screenshots , then he had to swap in the final screenshots and just all of his
592 Flash perimeters so you know the buttons were clicked in the places they were
593 supposed to. It did take some time but we had to accommodate what was
594 given. Another thing, this was not possible in the project, I would love to have
595 a face to face meeting with the client. The client was based in Boston, we

596 never had a face to face meeting, everything was over phone, or telephone
 597 conferences WebEx, using our in-house account manager as the interface.
 598 And if it is possible, it is always nice to have a human touch on the project.,
 599 yeah to sit down and look at the people, we were not able to do that. I want to
 600 say our account manager periodically went to Boston, she was based in
 601 Detroit too. We did it all over the phone, very virtual.

602 Q14 What are the other knowledge, skills or attitude which were not used in the
 603 above project but you used in other Web Based Instruction projects you led?

604 A14 Evaluation, the assessment, that was I think the big thing missing from the
 605 project. It bothered me that we didn't have enough time, budget or client
 606 interest to do more as far as reinforcing exercises or actual assessment to
 607 make sure people were learning what they were supposed to learn, I think that
 608 was the big deficiency of this project, the deficiency of this design, but it
 609 wasn't our fault. I would also like to have known a little more about
 610 implementation, at what stage it would be. Well we knew a little bit about
 611 this, but it kinds of bothered me that we didn't know how this courses were
 612 received. The courses were...this body of work was 45 minute, written for
 613 the automotive clients for the service technicians, and when we were
 614 translating, the original body of work was written generically enough it was
 615 courses about how to repair brakes, or basic electric theory ...basic enough
 616 that would apply to any automobile, so what we tried to do for all the graphics
 617 was that we did make a very...with the graphics, we tried to keep the graphics
 618 as generic as possible. Like if there was a picture of an automobile battery, the
 619 graphic artist would take Photoshop and wipe out the manufacturer label, to
 620 try to make it the graphic, so they would be applicable to any country not be
 621 offensive because we don't use that brand. In later courses where we were
 622 getting into more specific rollouts of vehicles, I know we did a project for
 623 Brazil, we were doing training on a specific automobile that was being
 624 introduced into Brazil, but it was basically the same automobile but with a
 625 different name and a little bit different look in the United States, so for that we
 626 had to make an accommodation to substitute graphics that were appropriate
 627 for Brazilian market. So yes, some of that did go on in later more customized
 628 courses or boutique courses. So I guess that's a skill that I didn't have to use
 629 in these courses but used just in almost every other ones, the international
 630 implications, whereas this courses was just for U.S. audience. What we did
 631 find in translation was we could use a fairly sophisticated English, the
 632 important thing was not the vocabulary, it was sentence structure. And so that
 633 I could use advanced vocabulary but the sentence structure is as much as
 634 possible should be noun, verb, object, that way a translator... because you
 635 know even though you are very proficient in English, you are always going to
 636 be better in your first language, so if you were translating automotive content
 637 into another language, the more clearly English is written, it is going to be
 638 much easier for you to translate into another language. So that was
 639 something. There was a great resistance in our office, the instructional
 640 designers just furious to write what they considered to be very blunt English.
 641 I would say to them, "Do you want to write flowery language or do you want

642 it to be understood in six languages?” So yes, that I think is the skill to be
 643 more and more... If you are going to be a corporate instructional designer, it's
 644 very important to be able to think through the graphics you use and your
 645 language and also your interactivity in the way the final published course
 646 operates to make sure that internationally your graphics, your language, your
 647 interactivity and the communication with the LMS will work globally. You
 648 know what, in those original courses, I saw it several other times during my
 649 tenure in that company is that after we have been translating for a year or so,
 650 whenever a new course would kick off, we would say, “Write for translation.”
 651 And they wouldn't do it, neither the XX's people themselves, or the client
 652 would say, “Oh, we are not going to translate this”. And the lower behold
 653 eight or nine months down the road, all of a sudden, “Oh, China wants this”,
 654 “Oh, Mexico wants this.” It cost a lot of more money because the English
 655 was not written so that it could be easily translated, it raises the translation
 656 costs, because often you get back a translation that doesn't make sense. So we
 657 had our internal linguist, she would look at the translation and say, “This is
 658 not making any sense”. So I would either pay the labor cost for her to revise
 659 things, or we would be sending back to the translation company and making
 660 them fix it. We would not pay them more money but it would cost more time.
 661 And when we bring it back, S would look at it again, and the same thing was
 662 happening was French, Spanish, German and Russian to. So it was much
 663 better to do it right first time.

664 Q15 Assuming you are hiring a person as a beginning instructional designer in
 665 Web Based Instruction, what skills are you expecting?

666 A15 I'm going to want to say that I want some basic instructional design theory, I
 667 want that person to understand the human cognitive structure. I want them to
 668 understand the information processing model of introducing information,
 669 knowing that it's going to sit in the working memory and understanding how
 670 to apply appropriate instructional strategies so that we can help the person
 671 incorporate that knowledge into their long-term memory. So I'm going to
 672 want some basic theory, maybe not sophisticated but to know that you
 673 introduce , you explain, you're going to reinforce the instructional strategies so
 674 that the person is going to end up owning that material. So some basic theory
 675 for web-based training, I think they are going to also have to be visual literate,
 676 this is something I am sensitive to because I am not a visual person, but I do
 677 know that for web based training visual literacy is very, very important, to
 678 know how to present information, so that people can easily understand it. I
 679 think with the web based training, you get to know how to stage your visual
 680 presentation, again don't cognitively overwhelm people Probably when
 681 somebody is looking at a screen, working memory is like 5 +2 or -2, visually
 682 you want to be very cautious not to overwhelm people. I think a beginning
 683 person is going to have to have good technical fluency. It seems that the
 684 employers now they want somebody who comes in, if they don't know
 685 Captivate or Camtasia, they're going to have to have the technical aptitude to
 686 pick it up very quickly. I don't want to say everybody has to know Flash, but
 687 Captivate or Camtasia or Audacity, they have to be comfortable with some

- 688 basic tools. Again, there are so many learning content management systems
 689 LCMS, you cannot require you must know Aspen, but again I guess the
 690 technical fluency, the lack of intimidation, to just jump in and be willing to
 691 load your content. So I would say basic instructional design theory, I would
 692 say basic technical ability. And one thing I saw over and over appalled me
 693 was that people coming out of undergrad program, these were native born
 694 Americans, they could not write grammatically correct English. In fact, I
 695 would say it is a real skill, people need to know how to write grammatically
 696 correct effective English, or their native language. If the course was being
 697 developed in Germany, write good Germany. I used to do a workshop of how
 698 to write global English. I used to tell those U.S. born people, "Write English
 699 as your first language". You know just because it's so irritating, I can't... it is
 700 appalling to me. So I would say they need good instructional skills, basic
 701 technical skills, and they need to be able to write to express themselves well in
 702 their native language.
- 703 Q16 Assuming you are hiring a person as an experienced instructional designer in
 704 Web Based Instruction, what skills are you expecting?
- 705 A16 For experts, besides the things I mentioned: theories, instructional strategies,
 706 technology, I would just say probably if you are an expert, you have to load
 707 on some project management skills, benchmarking skills. I would expect
 708 timeline management skill and budgeting skill. As far as soft skills, they need
 709 to know how to appreciate and respect team members, able to advise and
 710 mentor people. Also, I would expect them to stay current on changing and
 711 emerging eLearning technologies through reading, attending conferences (if
 712 budget allows), downloading trial versions and experimenting, or any other
 713 means the person might use.
- 714 Q17 Which direction do you see Web Based Instruction is heading to?
- 715 A17 I see it to be more technology involved, business oriented. The training would
 716 be more just in time training as well as the traditional type of training. I
 717 believe we will continue to have "books on line" interactive type eLearning,
 718 but the information will be presented in just-in-time smaller segments. I also
 719 think that with the evolution of smart phones, mobile knowledge management
 720 databases will become more prevalent. I also think that we will see more
 721 virtual K-12 schools as more parents opt for home-schooling or become
 722 disaffected with our public school systems.
- 723 Q18 What do you think an instructional designer should do in order to keep up
 724 with this direction?
- 725 A18 As an ISD, you are never done with learning. Don't isolate yourself, attend
 726 professional meetings, keep reading to keep up with broad knowledge. Teach
 727 yourself emerging technologies, to go conferences, participate in LinkedIn
 728 forums on eLearning. Keep thinking about the proper place for social
 729 learning, such as LinkedIn, blogs, Twitter, Nings, wikis. ...
- 730 Q19 Anything else that was not covered in our conversation but you think is
 731 important?
- 732 A19 I can't think of anything at this time. This was a very thorough and thought-
 733 provoking interview!

1

Transcription of Interview 007

- 2 Q1 Good Evening, thanks for taking time with me. Can you tell me your current
3 job title?
- 4 A1 I don't have any, I work for a company where we do not do those
- 5 Q2 How long have you been working in the current position?
- 6 A2 11 months
- 7 Q3 What's your age range: 25-35, 36-45, 46-55, and 56 above?
- 8 A3 36-45
- 9 Q4 Would you say you are actively involved in instructional design?
- 10 A4 Yes
- 11 Q5 Are there any other positions have you held before, that were related with
12 instructional design?
- 13 A5 Yes, several, it was four different types of positions related with instructional
14 design, I was a training manager for 7 years and instructional designer for
15 three years, and some other companies.
- 16 Q6 How many years accumulatively do you estimate you have worked in
17 design/development for WBI?
- 18 A6 I would say about 12 years
- 19 Q7 In those WBI projects, how many years accumulatively do you estimate have
20 served as a lead instruction designer/developer?
- 21 A7 I would say about four years.
- 22 Q8a What's the major of your bachelor's degree
- 23 A8a Near Eastern Studies
- 24 Q8b Did you have postgraduate education: Master's, or Ph.D.?(What's the major?)
- 25 A8b I have a Master's degree on Ancient Near Eastern Studies, and a doctoral in
26 Instructional Technology
- 27 Q8c Have you had any other training on instructional design?
- 28 A8c I've gone through a lot of conferences, and courses were offered by vendors
- 29 Q9 What's the business nature of your current organization: business/industry,
30 education, government/military, health care, independent, other?
- 31 A9 Business
- 32 Q10 What's the estimated size of the organization you are working for?
- 33 A10 200 employees
- 34 Q11 Can you tell me a Web Based Instruction project you are very proud of or got
35 highly recognized?
- 36 A11 We created a kind of web-based training application to teach HR
37 representatives how to implement a new HR program.
- 38 Q11a How many team members in the project?
- 39 A11a There was really a core team of two. Yes, another instructional designer. We
40 both had fairly good development skills, so we did the design and the
41 development.
- 42 Q11b How long did it last?
- 43 A11b Three weeks.
- 44 Q11c What was the project about, was it about how to complete a step, process, use
45 systems, or how to perform physical jobs, or change attitude/value?

- 46 A11c Yes, we're teaching people. It's primarily concepts and procedure.
- 47 Q11di Describe the project in a very high level (the process by stages)
- 48 A11di I think there was a short phase where we found the scope of the project,
49 identified client satisfaction criteria, determined exactly what we were looking
50 for, and then a very quick design and development phase with about two
51 weeks, and then implementation. It was internal.
- 52 Q11dii Describe the project in as much low level (steps, tasks) as possible
- 53 A11dii This was a long time ago. We had, we were first contacted by another group
54 in the organization. They were preparing to outsource the training to an
55 external vendor and I think the quote that they had gotten from the outside
56 vendor was in the range of \$70,000 and they had heard that we had developed
57 a method for quickly developing web based courses and wanted to see if we
58 could help them out, and I think it really helped out with several thousand
59 dollar charge. We had several meetings initially where we established the
60 nature of what they wanted to teach, identified the learning and performance
61 outcomes. And then once that was done, we met with subject matter experts
62 several times to get the contents together and then the development of the
63 resources that we needed, and then several meetings meeting with the
64 customer to allow them to review the content and make changes and things
65 like that. There was, I think, a reaction questionnaire that was associated with
66 what we did. We didn't do any sort of measurement of learning or
67 performance. Yeah, it was web based intranet. It probably was close to an
68 hour. It was fast. And that part of the reason why this is one of the courses that
69 I think really highlighted – is one of the best ones that I've engaged in,
70 because the incentive, uh that's not the right word, the sponsoring
71 organization was very motivated to get them quickly. We were given all the
72 resources that we needed, and we had the right people to get it done. Well,
73 actually we had tested the development model on other courses and had
74 produced several courses and had been kind of documented methodology, and
75 so people, the group that needed the course heard about it, so they came to us.
76 I think we probably weren't the first choice, but they were really under the
77 gun, so that's what got them to us. As far as resources go, we actually didn't
78 need all that much, because we had the ability and necessary competencies
79 with the two instructional designers to do all the development as well as the
80 design. One of the reasons why it was so successful was we didn't ask them
81 for so much. During those three weeks, we were really engaged in this one.
- 82 Q11diii What event/communication marked the beginning of the project?
- 83 A11diii You know, there may have been but I wasn't involved in it. I'm going to
84 guess it was a kick-off meeting with people higher from the organization.
85 Then we just got a call. They said, "Can you do work on this project?"
- 86 Q11div What event/communication indicated the completion of the project?
- 87 A11div The project really ended when the course was—for us anyway—when the
88 course was loaded into the learning management system and people began
89 registered on it. We were fortunate in that it went live, there weren't any
90 problems that required us to go back and rework the content but it actually hit
91 the ground and worked very well. I don't remember precisely, I think what we

92 did is we took all the files that we've created, zipped them up, and then sent
 93 them to the team they uploaded it to the learning management system.

94 Q11dv What was your role in the project?
 95 A11dv Design and development, project management as well, working with the
 96 subject matter experts, did a little bit of graphic content development. My role
 97 is primarily working with instructional designers to—I'm sorry, working with
 98 subject matter experts to identify the [content] and get it represented in the
 99 course. We had created a tool that allowed us to use the design document as
 100 part of the course. I know that sounds odd, but we created a tool that allowed
 101 us to... that converted Microsoft Word content and put it into HTML, and it
 102 was designed... yeah, and it was designed in such a way that the content, uh
 103 we didn't want in the course, we just would assign it a certain style and when
 104 the course played, we just ignored that content. There was one Word
 105 document that had the content. There was another Word document that
 106 contained the course outline. And the tool again took the outline document
 107 and converted it into the course navigation. And so, those were the two
 108 documents that we worked with. It's correct to say we automated the process.
 109 We just – or another note on that, our attitude was we were at a meeting where
 110 instructional designers would say things like, "Well, I went and worked with
 111 the subject matter experts and then I went back and it was all these work." We
 112 decided that we would create a project where we got rid of that, went back
 113 and... part of instructional design that we tried to make our instructional
 114 design so that it happened in front of the customer, so as the customer says,
 115 "Well, I need the course to do this, this, and this." Between the outline
 116 document and the content document, we actually built the course. So as we're
 117 building the content and working on the outline, we could push it then, and
 118 then the subject matter experts could see how the course was starting to shape
 119 up right there. Yeah, so we had several interactive pieces and those were built
 120 while we were not in front of the SME. In this particular course... well, let me
 121 put that again, we had taken the same approach that we used for overall
 122 course development and had applied that to the interactive pieces as well. So,
 123 for example, we had several things – we actually called it interactions and
 124 these were Flash products that pulled data from Word documents, and so you
 125 could at run time... and so the Flash file grabbed the content from Microsoft
 126 Word and explained. So it actually allowed us to create some fairly
 127 sophisticated interactions entirely in Microsoft Word, if that makes sense. We
 128 identified the base parts in Flash file that required content that might be
 129 specific to particular course and we made it so that the Flash file would pull
 130 that information from the Word document and that allowed us to reuse the
 131 interactive confluence across courses. We had to... we had to write the Flash
 132 file in such a way that it would load in an XML file in run time, and so that
 133 coding happened before we were working on this course. We already had
 134 those interactions developed. I did the Flash development. We had both audio
 135 and video in this one. Well, the two of us did the audio and video work as
 136 well. We created JPEGs and MOVs and AVIs and stuff like that. The audio
 137 wasn't music; it was – I think we had several parts where I think there was an

- 138 introduction from one of the HR leaders. It was on an audio, and then we had
 139 a couple of other instances where there was an audio narration that the
 140 company pre-texted.
- 141 Q11dvi What software and services were used?
 142 A11dvi Well, again, we had developed a tool that allowed us to do most in Word. So
 143 we used Microsoft Word. We used, of course, PhotoShop for the images. We
 144 used I think Adobe Audition for editing audio file. We used, of course,
 145 Internet Explorer for displaying the content. Uh, I am try... I do not
 146 remember. What was the name? Adobe... Premier... I think we used Premier.
 147 We didn't use any outside services.
- 148 Q11dvii What hardware and devices were used?
 149 A11dvii No, I think we just used a microphone, it might have been a little bit fancier
 150 than the one on the computer, but it wasn't a big deal. We used the digital
 151 cameras for taking pictures – nothing special beyond that. Yes, we used Flash,
 152 but all the Flash work was done prior to that course, so it's probably worth
 153 mentioning.
- 154 Q11e What were the outstanding features of this project?
 155 A11e I think the speed with which we went from initial contact to development. I
 156 think the relationship we developed with subject matter experts because
 157 they're able to see their ideas presented in the course instantaneously. We
 158 saved the other department ton of money. I think those were the big things. I
 159 would say there were probably three SMEs. When we talked with SMEs, we
 160 talked with all of them. We had kind of a big meeting that kicked off and then
 161 we met with one several times where we really got into the deep recal of what
 162 it is that they needed and how they wanted it done. And then after we finished
 163 putting all the content together, we had another meeting where they all kind of
 164 looked at it together.
- 165 Q11f Did it occur to you that you wish to have done the project differently?
 166 A11f Looking back on it, I'm sure that if we had more time, we could have
 167 improved the interface, just the look and the feel. I think we also could have
 168 better identified how the target audience would actually do the process and
 169 perform what they're being asked to do and then better demonstrated that,
 170 because I think we gave them the base case of, "Here's you can use this tool."
 171 But as I think back on it now, we probably could have showed them, "Here's
 172 the main way that you could use it, but let us also show you another example
 173 of having it this way, an example of how you could use it in this situation."
 174 But I think we should have provided a greater variety of applications to it. The
 175 SMEs did tell the target audience characteristics, and I know we asked the
 176 questions to get at that. So for example, there's an international audience, we
 177 knew the organizational role; we knew that they did not have experience using
 178 the tools that were being implemented – so I think they were forthright in
 179 answering all the questions that we had. I think what happened was is we
 180 came to a better understanding of what exactly it was that they were asking
 181 for... we were already far enough down the tasks but we couldn't have made
 182 all those changes.
- 183 Q11g What were the solution(s) to the challenge(s)?

- 184 A11g You know, that's a great question. We were... so what I said earlier on that
 185 we were given the resources that we needed – that's not exactly true. One way
 186 in which we're kind of limited was access to the target audience. I do recall
 187 that we did get access to one person. He was able to come and actually took
 188 an early draft of the course and actually went through it, but that was just one
 189 person. It would have been nice to have been to do that test with somebody in
 190 another country, and we weren't able to do that. And when I say interface,
 191 about wanting to improve the interface, it's really I think more about the look
 192 and the feel, just a little bit more professional than what we had. I think we
 193 needed a full-fledged graphic artist. We had somebody who was good at
 194 graphics but was not...didn't have the ability to do the interface that I think
 195 was needed. But not to say that it wasn't a good graphic, it was very good, but
 196 I think it could have been a little bit better.
- 197 Q12a What specific knowledge, concepts, and ideas that helped you?
- 198 A12a A couple of things: I think what differentiated us and made us successful was
 199 following a development process that was more of a rapid prototyping model,
 200 where we went to... had several very quick iteration, rather than doing all the
 201 design and all the development and testing and stuff like that. We would
 202 design, develop, and test really fast, and we did that maybe—I don't
 203 remember how many times—four or five times, you know, to... and so we
 204 would meet with subject matter experts they were here, and everything that
 205 they shared with us was implemented, and then iterated. And so, that was one
 206 thing. I think another thing that helped was, I think, understanding the
 207 learning theory is very helpful, and I think having the development skills was
 208 very significant, because we're just able to take an idea and implement it.
- 209 Q12b What soft skills did you use?
- 210 A12b I think building a strong relationship with the subject matter expert was
 211 important, as well as communication with the customer or the client. Because
 212 the subject matter experts did not have a lot of time, had we had not
 213 demonstrated competency in our profession and built a good relationship, we
 214 wouldn't have been able to get their time to do what we needed to do. Yeah,
 215 that was huge. That's as far as soft skills.
- 216 Q12c What hard skills did you use?
- 217 A12d You know, we had the ability just on our team to do all of required technology
 218 development, I mean, all graphics, all audio, all video, and that was
 219 significant. Anyway, I think that's all to that. So for example, if you were
 220 working with the subject matter experts and you were sitting there behind
 221 your laptop and projecting on the screen of what they are saying and they see
 222 you're moving in Microsoft Word like you own it, that's huge, because you
 223 could... I mean, they see little things happening like keyboard shortcuts and
 224 auto text entries happening, things like that, and you were representing what
 225 they're putting out almost as quickly as they can get it, uh, that's huge,
 226 because they see that as they gave you their time.
- 227 Q12d What attitude did you realize that was helpful for the success of this project?
- 228 A12d We're a little bit cocky, I think, because we knew that we could do well what
 229 it was that they were asking for. And I think there's also this desire to prove

- 230 ourselves and the method we were using. I don't know that I would say we're
 231 open-minded. I think another attitude we had was one of not telling them what
 232 the way we thought it should be, but really asking questions trying to
 233 understand and identify what it was that they want.
- 234 Q13 Which year was the project? What do you wish to have known that you didn't
 235 know back then?
- 236 A13 Maybe 2004. After the project that I just described, I was able to spend a lot of
 237 time with Michael Hammer. He wrote several books that ended up being in
 238 New York Times. One of them was "Reengineering the Corporation."
 239 Another one was called "The Agenda." I was able to pick up a process
 240 engineering – or process reengineering background – as well as a little bit Six
 241 Sigma understanding, and I think having a better understanding of how
 242 business processes worked would have helped us better identify—no, scratch
 243 that—would help us better guide the subject matter expert into really focusing
 244 in what it is that people needed to do and understanding the inputs and the
 245 outputs, and that would have helped us better frame the content for the users.
 246 I think how I would change or better change the course is that I would have
 247 focused on, "Okay, what are some triggers that would indicate that you need
 248 to start this process of teaching you?" And we really didn't teach that. And
 249 then we also could have talked about, okay, as you're doing this process, what
 250 you should be thinking of as the deliverables. We didn't teach them that
 251 either. And if we had done that, I think that would have given them a better
 252 sense of, "Okay, here is the tradition, here's what you do, here's the output."
 253 As it was, we really kind of focused on the process. Well, not necessarily
 254 beyond the process, because a well-defined process includes the suppliers
 255 input in the process and output in the customers, in fixing the language that is
 256 called Sidepot. If we had had a better understanding of how business
 257 processes work, we would have investigated more deeply the specific process
 258 that we were taking and better define that, and then we could have a better
 259 design. Better understanding in general of how business processes work
 260 would then help you ask the right questions to better understand the specific
 261 process that you're trying to teach.
- 262 Q14 What are the other knowledge, skills or attitude which were not used in the
 263 above project but you used in other Web Based Instruction projects you led?
- 264 A14 Well, so, closely related to – let me just give you another quick example. At a
 265 job subsequent to the one we've been discussing, I was in a team that
 266 developed an instructional product that was primarily procedural in nature.
 267 We're often teaching people how to operate software program or do a process
 268 that included software. Often people would come to us and say, "Hey, we
 269 need you to teach us how to do this," and then I designed an instructional tool
 270 and they floundered for a while. Eventually, I came to realize the reason why
 271 we were having trouble is because the business hadn't really identified what
 272 its process was, and so if you have an instructional designer who is teaching
 273 process who doesn't understand the business process, you're going to have a
 274 hard time working with the subject matter experts. Yeah, in fact, I think the
 275 instructional designer should have an introduction to business processes. It's

276 part of the core curriculum if they are planning in going into business. Yeah, I
 277 think now you're going to have an introduction to Six Sigma, you have an
 278 introduction to QA, you ought to have an introduction on how to design a
 279 business process. Just a quick story: I was talking to the chair of probably one
 280 of the top ten instructional design programs in the United States, and I said,
 281 "When was the last time that you sent out a survey to the employers that are
 282 hiring your graduates and ask them what skills, attitudes, and things like that,
 283 that you should be teaching them in your program?" "We never have and I
 284 never will", because he thought that he knew what they needed more than they
 285 needed. He was really an arrogant... that I was... he'd actually kind of set me
 286 back. That's why I remember the conversation.

287 Q15 Assuming you are hiring a person as a beginning instructional designer in
 288 Web Based Instruction, what skills are you expecting?

289 A15 I would love it if they had a good foundation of... and be able to quickly learn
 290 software applications, and if they had at least a basic understanding of how
 291 audio files work, video files work, HTML works, could do web development,
 292 and they have to be able to quickly pick up applications like Captivate and
 293 Camtasia. The idea was they would be able to quickly pick up applications
 294 that would allow them to build a course. If I had somebody who had excellent
 295 instructional design skill, but didn't have any of the technical stuff, I don't
 296 know how useful they'd be, because – it's actually interesting that I've had
 297 several people that have been on my teams who were instructional designer
 298 but didn't have development skills and they were almost useless, because
 299 what it meant then is that... let me slow down here, what it meant was that
 300 they consumed a developer's time, where if I had an instructional designer
 301 that could do the development, it's much more efficient than paying two
 302 people to work on the project. I got to have one person do it. Oh, yeah, and
 303 then the other thing is the fact that they had business acumen, again,
 304 understood business processes, and then... you know, a very practical get-it-
 305 done instructional methodology and I think like, what Ruth Clark teaches is
 306 great, some of David Merrill stuff is really good – yeah, somebody that can
 307 get it done.

308 Q16 Assuming you are hiring a person as an experienced instructional designer in
 309 Web Based Instruction, what skills are you expecting?

310 A16 Well, for somebody who's experienced, I would expect that they might have a
 311 better understanding of the learning management system and some of the
 312 standards like SCORM that they could talk intelligently about measurement.
 313 Boy, it would be great if they use Visio and could identify documenting
 314 process. It would be great if they came prepared with a design document
 315 template, an instructor led template and a job aid template. And they had a
 316 toolbox of things that they had accumulated over their years of work, so that
 317 when they hit the ground, they would just knock away the subject matter
 318 experts with how quickly their courses were put out. The management skill, it
 319 would be great if they can talk to the graphic artist, they understood graphic
 320 artist tools like Photoshop, things like that. It would be great if they could talk
 321 to developers and knew enough about codes, understand when the developers

322 were leading them down the wrong path. We had – I had a lady who worked
 323 for me come to me in tears because she was in a meeting where people were
 324 yelling and screaming at each other, and you got to have a thick skin. If you
 325 think about it, I mean, most often, very most, training is an afterthought,
 326 they're arguing well down the project plan and somebody says in a meeting,
 327 "Oh, hey, shouldn't we teach people how to do this?" That happens all the
 328 time. And so, training came to them when you're under the gun and if the
 329 tensions are high and the project ought to get out door soon, and if somebody
 330 starts yelling at you and you melt down, that's not good. I think it's more for
 331 the experienced person, but if you think about it in a graduate level program,
 332 if you're going to have a project that you're putting instructional, you know,
 333 people who are learning instructional design, you might want to simulate
 334 some of that stuff, you know, have the instructor come in and scream at you
 335 for a little bit. You know what? One of the best things I've come across is a
 336 great tool out there called 'management tool' and they have an excellent tools
 337 and resources for how to do that.

338 Q17 Which direction do you see Web Based Instruction is heading to?

339 A17 Probably more and more mobile devices. Well, I did my graduate work at a
 340 constructivist's stronghold, so I have to believe that – I worked in a company,
 341 it's very successful. It's growing quickly, and there is no internal training.
 342 There is no training budget that I've heard of. It's almost not I paid attention
 343 all. And they get by. So anyway, I don't know, I don't have anything
 344 important to say about that because I'm not sure. Well, I think there are a
 345 couple of other things: Like the Khan Academy – have you heard of that? It's
 346 Khan Academy. It's either K-H-A-N or K-A-H-N Academy. You ought to
 347 look at it. This guy has hundreds, if not thousands of short videos that teach
 348 all the concepts that ranges from basic addition up to math calculus, and I
 349 think he's now added stuff on chemistry and physics and engineering and
 350 social sciences. You can go out and learn about a ton of stuff there. I think
 351 what you're going to see happening is that learning becomes more of where
 352 you go out and find the information that you need.

353 Q18 What do you think an instructional designer should do in order to keep up
 354 with this direction?

355 A18 Well, I think in business, we need to demonstrate that our skills add to the
 356 bottom line – that as a business implementing a new product to service, that
 357 its success is closely related to how well people are prepared to perform. So I
 358 think there's a little bit of selling that we need to do, and I think we need to
 359 demonstrate competency in the tools that are required to do it. Anyway, you
 360 know what I... I'm just thinking aloud. I don't know if it's correct, often
 361 people going to teaching and training, because perhaps they don't have good
 362 technical skills, something like that. It's not that they love teaching and are
 363 passionate about teaching, but they're not... they couldn't make it in the
 364 engineering and they couldn't make it into – I don't know. So then, in
 365 teaching and they go show up and try to work with people who are really
 366 strong with technical skills and they just don't make it. Well, yeah. So, you
 367 know, the other thing that I found helpful has been I was able to do graduate

- 368 school at two locations. One was, had a very cognitive perspective and the
369 other one had more of a constructive perspective. I am very grateful that I had
370 both of those, because it allowed me to kind of compare, contrast both of
371 them, and so I think there's so much out there about learning theory... I think
372 having a strong foundation of learning theory is very important. So many
373 times you would hear people saying, oh, I am a visual learner, auditory
374 learner, I am a kinesthetic learner, or something like that. Well, they
375 completely misunderstand what that's all about, and it seems like I hear more
376 about learning that's actually incorrect or not accurate according to what
377 learning theories have to say, that's probably the way to put it. Anyway, so I
378 hope people coming out of a program would actually talk about behaviorism
379 cognitivism, and constructivism.
- 380 Q19 Anything else that was not covered in our conversation but you think is
381 important?
- 382 A19 No, I think I'm good.

1

Transcription of Interview 008

- 2 Q1 Good Evening, thanks for taking time with me. Can you tell me your current
3 job title?
- 4 A1 Senior Instructional Designer
- 5 Q2 How long have you been working in the current position?
- 6 A2 4 years
- 7 Q3 What's your age range: 25-35, 36-45, 46-55, and 56 above?
- 8 A3 36-45
- 9 Q4 Would you say you are actively involved in instructional design?
- 10 A4 Yes
- 11 Q5 Are there any other positions have you held before, that were related with
12 instructional design?
- 13 A5 Yes, since 1996.
- 14 Q6 How many years accumulatively do you estimate you have worked in
15 design/development for WBI?
- 16 A6 Since 1996.
- 17 Q7 In those WBI projects, how many years accumulatively do you estimate have
18 served as a lead instruction designer/developer?
- 19 A7 8 years.
- 20 Q8a What's the major of your bachelor's degree
- 21 A8a HRD/ Training and Development
- 22 Q8b Did you have postgraduate education: Master's, or Ph.D.?
- 23 A8b No
- 24 Q8c Have you had any other training on instructional design?
- 25 A8c Completed 16 credit hours of Masters at WSU.
- 26 Q9 What's the business nature of your current organization: business/industry,
27 education, government/military, health care, independent, other?
- 28 A9 Retail/ Direct Sales, audience resembles that of a volunteer workforce...all
29 demographics
- 30 Q10 What's the estimated size of the organization you are working for?
- 31 A10 5,000 Employees serving 3 million Independent Business Owners worldwide.
- 32 Q11 Can you tell me a Web Based Instruction project you are very proud of or got
33 highly recognized?
- 34 A11 That was a basic selling skills course. The instructor led version that we built
35 was three hours long. We had to put that into a Web Based Instruction. The
36 Web Based Instruction boils down to close to about two and a half hours. We
37 broke that up over the course of nine mini courses. It is a sales process, more
38 of a soft skill. It's still a process.
- 39 Q11a How many team members in the project?
- 40 A11a I was one of those six. One of the main members was one of the managers of
41 instructional design. It was her and I from XXXX's standpoint. We were the
42 core people from XXXX. The other four were contracted through a vendor.
43 This was an instructional design house out in Utah. We worked remotely.
44 They provided a lead instructional designer, a project manager, a graphic
45 designer, and really kind of main developer. They do follow a process similar

- 46 like essentially an assembly line, right. Basically, at any given point probably
 47 ten different people working on it at their location in Utah. Those were the
 48 people that were on the project. We did not develop the core of that, it was
 49 done by an outside vendor. We were doing the coding in Lectora. My
 50 responsibility was all the analysis as well as the high and low level and
 51 storyboard design. I did all the instructional design on it. I was the lead
 52 instructional designer from our standpoint. Essentially, I had a counterpart that
 53 I would work with.
- 54 Q11b How long did it last?
 55 A11b One year.
- 56 Q11c What was the project about, was it about how to complete a step, process, use
 57 systems, or how to perform physical jobs, or change attitude/value?
 58 A11c It is about process
- 59 Q11di Describe the project in a very high level (the process by stages)
 60 A11di I will start with the analysis stage first. Strategically, it was requested by
 61 upper management, executive level management, that the retailing aspect of
 62 our business moves forward, or rather the retail sales increase. Based on that
 63 direction, we had some hunches are, “Okay well, why do people recall
 64 products,” why aren’t they selling these things. Based on that, we started first
 65 looking at numbers to verify that they are not recalling products as expected
 66 or desired, from our standpoint. We looked at a number of factors. We
 67 looked at essentially their line management, our communications. So I was
 68 talking about from a vertical standpoint, do they know that they should be
 69 selling product. Because our business model you can make money three
 70 different ways. You can retail products just like you would expect a consumer
 71 to pay a store that makes money above and beyond their cost. Well they are
 72 also compensated based on how much volume – how many products move
 73 through the business. It doesn’t always have to come from retail sells, which
 74 means that part of this model you can earn a little bonus or money back based
 75 on different purchases that they use themselves. The third way is that by you
 76 teaching other people to do the same thing. The same thing being that, try the
 77 products yourselves, become familiar with them, sell them to other people.
 78 Just like any sale organization, you are rewarded based on your performance,
 79 as well as money. So you look at all the dynamics to say, “Hey, do they
 80 understand that part of the equation,” which they didn’t. They always
 81 understand the amount of money you can earn from retailing, the products
 82 have a more traditional business model, as opposed to just using products and
 83 sponsoring them and people using the products, as well. So that all really
 84 came from the main office, phone interviews, and then we would verify those
 85 phone interviews by going interview but not behavior. It was a problem
 86 analysis process. So then the other part of the analysis is finding out who are
 87 the master performers that we think that everybody should be leaning towards.
 88 We began looking first at sales numbers from our place, from our offices, to
 89 identify them, and then follow verification interviews with their line
 90 management. We say, “Hey, are they really selling these products?” Then
 91 after we interview them, we find out how they are retailing these products.

92 There is essentially our task analysis and then what we do is look at that data
 93 and compare it against the more traditional sales models that are out there.
 94 That was really the analysis phase, so everything from gap analysis to
 95 verification to write down the task analysis, all documented. Documentation
 96 is about everything from electronic surveys before meetings, to write down
 97 the audio and video reported system. Then the design phase, we start with a
 98 very high – what we call a high level course, whereas the high level course
 99 lays out the goal of the course as well as terminal objectives we want to
 100 achieve, with a propose sequence of those internal objectives. That was really
 101 the high level piece. From there, we went to mid level which takes all those
 102 punch so we started catching enabling objectives, internal objectives. We
 103 start sequencing proposed learning activities. The learning activities could be
 104 not necessarily detailed down to the storyboard level, but essentially to reach
 105 enabling objective, just exercise – this is the overall type of exercise. It could
 106 be a matching exercise of fill-in-the blank exercise. We would attach context
 107 to that and put that in sequence in our documents so that we could review
 108 them with our subject matter experts.

109 Q11dii Describe the project in as much low level (steps, tasks) as possible
 110 A11dii From the middle level design we move down towards that low level detail
 111 design document which is more of closer to a storyboard, a screen by screen
 112 storyboard. So at this point now we are starting to see, “Okay, on this page
 113 these are the words that... We can’t really stay this is a type of graphic. Well
 114 if we had a graphic we would drop the graphic in there. We used a
 115 PowerPoint to storyboard out. I mean this is probably the other piece I would
 116 note, is it all a very... process. We’re talking two or three storyboards.
 117 It was a vendor who was doing the development for us. So they would
 118 actually provide a delivery schedule. So it’s not just they would come up with
 119 a storyboard and completely produce this and then send it over. From their
 120 standpoint, that’s where the graphic designer comes in. They start conceptual
 121 look and feel, mocking up wire frames for the interface. We begin turning
 122 over our brand guideline, select and use images as well as any images or
 123 videos that were identified earlier on in the processing, “Hey, this could
 124 support this learning activity,” if it was video based or some imaged based
 125 thing. We then turn those over at this time. Both of the vendor and us
 126 provided videos and audios. I would work with them to script, as well as act
 127 essentially a producer director for the site for video shoots. Again, this is a
 128 sales course so we thought it very important for part of the learning process
 129 was to model the ideal behavior as well as model some of the behaviors that
 130 are not so desirable. We use a number of different ways, but again they would
 131 coordinate it through a vendor that they used as well as – everything from us
 132 selecting talent that they sent over. We would have audition tapes to then go
 133 out and propose a location. It was so professional, high production value, this
 134 course was. I was involved to something like video. But I’m not the one
 135 holding the camera. I’m just there directing and advising and working on the
 136 editing. At least once a week, I met with them to update. Typically two or
 137 three times throughout the week virtually, so a phone call or WebEx or they

138 will be sharing files over. For review purposes, they use a system by which
139 they could upload a Lectora course. Each page would allow me to provide
140 feedback through a tool. So if you want to envision it, the top bar had a little
141 button that said leave feedback. When I click on that feedback link it would
142 already populate the page I was on and then it would prompt me to say – it
143 would also record who I was. If you're familiar with a product called Clear
144 Course or Clean Course, it was very similar to that. It is a platform that
145 allows me to do online collaboration. But just only from a review standpoint.
146 It was not from a development standpoint. That was it. They did most of the
147 heavy lifting. I was the one to sign off. They gave me a chunk of information
148 to sign off instead of a whole piece. The next phase after that really is
149 obviously the implementation phase, thereby which after we verify that the
150 content is right, that it looks operating right, they then send over files to us in
151 a digital format that we would upload to our learning management system
152 which is a sum total, which is behind a firewall. Regarding the project
153 features, part of the project specifications and the requirement on the vendor's
154 behalf is to deliver it to us in a SCORM format. I think it was SCORM 2004.
155 But we were using SCORM very minimally. We were not using all the
156 capabilities that SCORM provides, for a number of reasons. Keep in mind we
157 deal with the volunteer work force so it's not advantageous for us to require
158 things or punishing them for not completing something. It needs to be a very,
159 very positive experience. We don't have to do the configuration and we just
160 put into LMS. We have a set of guidelines or requirements that we provide to
161 the vendor. But given the SCORM format and the Sum Total SCORM
162 compliancy, it is plug and play, which is the intent in SCORM. After we
163 launched it, we began tracking who is taking it, how long is it taking them to
164 complete it, what are the responses to the quizzes. So we are looking at
165 completion rates, we're looking at how many attempts, how long they are
166 taking, how many times they revisited it as well as tracking their scores. But
167 we are not explicitly telling them what their scores are, because there is no
168 pass or fail. From that standpoint, we are looking at that as far as the scope of
169 the course goes, but we are also comparing those people within a specific
170 organization. Say you are part of a sales organization over in Troy, Michigan
171 that is based on their 30 people, and 15 of them are taking it. We will take
172 those 15 and compare your sales results against those other 15 who did not
173 take it. So that's just one part of it. We are also looking at your business as a
174 whole, what is happening with your business? Is it growing or is it shirking,
175 and what are the key performance indicators that are moving. Then we
176 document those. We don't have to report the result to the customer – in this
177 case it wasn't required for us to report to anybody, but we did. You got to
178 prove your work. Yeah. It was effective. But what we are finding is that
179 while the people that take it or the majority increase their retail sales and grow
180 their business against those who don't, but what we're finding is that we have
181 low completion rates. That is causing us now to start researching why are
182 there low completion rates? So we are starting to talk to people in the field
183 and say, "Hey, we see that you started this course. Why didn't you finish it?"

- 184 We had some hunches, but I think the nature of the business, again, is a
 185 volunteer workforce so we are competing for their time against multiple
 186 aspects. Again, they are independent business owners, so if they want to
 187 make money – just like anybody else – do you want to spend your money
 188 producing something or spend your money, in time, producing something. Or
 189 do you want to spend it learning, which you are not being compensated for. It
 190 is true that they will benefit from learning. Yeah, but not immediately, right?
 191 To address to that we actually starting tying some financial incentives to them
 192 taking the training. We actually got a little bump in there. But not as great as
 193 we should, and it is kind of disingenuous to do it right. We had to justify that
 194 just in turn with our own department. We actually looked at that and said,
 195 “Yeah, this is a valuable thing.” But in our reports to the executive
 196 management, it was that we moved the needle for them on the key performer
 197 indicators based on this intervention. We didn’t go back to revise and change
 198 a lot of things. Maybe just a couple of things from a technical standpoint, but
 199 from content standpoint we had not gone through the revision phase yet.
 200 That project was in 2009.
- 201 Q11diii What event/communication marked the beginning of the project?
 202 A11diii Again, that event was as the sales were declining, specifically retail sales were
 203 declining. The event was the managers actually saying we will fix this.
 204 The timeline for results was three years. We did it within a year and a half.
- 205 Q11div What event/communication indicated the completion of the project?
 206 A11div Other than us paying the vendor, no. We just celebrated. We didn’t have a big
 207 celebration or anything, but we did take the results and submitted a CD for an
 208 award, which we had recognition for. We didn’t win the gold but we won
 209 something else.
- 210 Q11dv What was your role in the project?
 211 A11dv The analysis was really the interviews as well as the research. The research
 212 incorporated some of the common, more published sales processes. I did the
 213 research. I would reach out to get help for research. I would work with our
 214 internal financing department identifying who were the master performers.
 215 They keep the numbers and they can identify who the top salespeople were. I
 216 wrote the gap analysis and task analysis. Those analyses go up through our
 217 management. The manager of instructional design then goes up the director
 218 of training. They have to approve the way to go. I did everything. I was the
 219 primary designer around that. All that would then go off to my manger for
 220 review and we would go around essentially that review process. Then we
 221 work with our stakeholders and say, “This is what we’re proposing for the
 222 design,” and have such rationale on it. And they have to sign off. In terms of
 223 management, my primary responsibility was interfacing with the vendor and
 224 making sure things progress. Again, they had a project manager that really
 225 kind of ensured that he or she helped hold them accountable. I was the one
 226 going out of the field to coordinate activities. It is part of that belief of
 227 instructional designer position really is letting an instructional designer work
 228 as well as managing a project. It is like in the team, the manager managed me
 229 and I managed everybody else. Talk about challenges, I guess perhaps the

230 level of service I expected from the vendor didn't really match up with what
 231 they were providing. That's a very difficult thing to work through. It's more
 232 from the design skill aspect. In this case there were certain things that I would
 233 have expected them to do and they didn't do it, things like around scripting of
 234 a question or scripting of a scenario or interaction. I would expect a higher
 235 output. I had to negotiate with them. There is actually a couple times where I
 236 had asked them to redo the work. There were other times when I just did it
 237 myself and said, "This is how you should be executing it." Prototype of
 238 process was part of their processes, really incremental standpoint. So the
 239 graphic designer would essentially come up with a graphic for the same theme
 240 as well as the wire frame and navigation and functionality. So when we were
 241 putting content in for the first go around, in the first process, things might not
 242 be the right image. It might just be a box of the description of the picture
 243 that's supposed to be there or the video is going to be there, and then we said,
 244 "Hey, yeah this content is right." We took it from the standpoint that content
 245 is king, not the fancy fonts and clip art. I approved the prototype and
 246 management above me. Well, the implementation, we actually turned that
 247 over to our learning management system administrator. We would put the
 248 course up and he would launch it himself. I never actually have to go into
 249 LMS. The training result data that we can go get in the LMS that was
 250 provided to me and then I would in turn coordinate with our internal
 251 department such as finance or registration to get the other metrics.

252 Q11dvi What software and services were used?
 253 A11dvi Again, the whole Microsoft Office suite, really everything from Excel to
 254 Word to PowerPoint, and then Lectora, Flash, full motion video, Photoshop,
 255 Adobe Illustrator, stock photography and custom photography. I hated
 256 Lectora. That was our corporate government saying that, "Yes, you must use
 257 Lectora." They wanted that done. We have since moved away from it.

258 Q11dvii What hardware and devices were used?
 259 A11dvii It is PC based nothing special.

260 Q11e What were the outstanding features of this project?
 261 A11e Oh sure. One of features is pre-post confidence assessment coupled with
 262 selling scenarios facilitated via video. So rather than do a pre-imposed test
 263 around their skills, which would be negatively viewed by our audience, we
 264 really want to – "Okay, what else can do to distract where they are before they
 265 go into the course and where they are immediately when they come out of the
 266 course." We said, "Okay, can we gauge their confidence." Because the lack
 267 of confidence will have a large impact on your performance in a job or some
 268 sort of task. We found value and gathered that type of data. That was really
 269 cool. The other cool part was actually doing the integrated full motion video
 270 scenarios into the course. These were necessarily branching scenarios as
 271 much as they were things showing me a video and saying, it was a bad video
 272 and asking the learner say, "Based on what you saw what is your knowledge
 273 previous to the course. What do you think went wrong here? Did this sales
 274 representative make the right choice or the wrong choice?" After that we
 275 would show them the right way, the right video. So gave them chance to

- 276 think about it. It was just a different way to engage learners cognitively,
 277 rather than sit back and watch the perfect way to do everything every time.
 278 These scenarios were not of high risk, like launching a space shuttle. It was
 279 just saying, there is low risk both from a result standpoint and from a personal
 280 or confident standpoint, to engage in that way. There were some interactive
 281 exercises that worked with the video. It was everything from compare and
 282 contrast your answers to multiple choice to drag and drop, the whole gambit
 283 kind of thing, even just a couple three level branching scenarios. We are
 284 actually doing a lot more video right now. Typically, we use professional
 285 videographers. The nature of our business to be very public facing. It kind of
 286 requires that image maintenance. But we are doing some more lesser quality
 287 things, I guess you would say, or more still images second siphoned through
 288 production value and it's good enough. That's a big challenge with us, is that
 289 good enough or does it need to be a high end video. Loading large video files
 290 which may be very slow, but not really, because what we did is rather than
 291 launch a video full screen, which if you want a descent quality video and you
 292 launch it full screen that would be a problem. These video windows are
 293 relatively small and low timing. We had coding in there that would actually
 294 start preloading a video before you go to it.
- 295 Q11f Did it occur to you that you wish to have done the project differently?
 296 A11f I don't like when I have used a vendor. Again, I probably would have done it
 297 myself. That's probably one of the biggest things. I would not use a vendor. I
 298 would just do it myself due to consideration of saving money and speed of
 299 market and those frustrations. I think in part they were a disadvantage because
 300 of the distance. But more over just to be honest, it is poor performance, the
 301 things that unexpected and instructional designer to provide, just the
 302 developer to provide. It was a lengthy course which was two and a half hour.
 303 It was just too big. Again, we deal with the volunteer workforce so it's hard.
 304 It's hard to get their time. This is a part-time job for them. They spend
 305 maybe eight hours a week on something like this, on average, on this type of
 306 business. If I ask them to take two and a half hours out of that eight hours,
 307 taking them away from their sales and other business meetings, that's a lot of
 308 competition for not immediate results. I did give some incentives, it helps. It
 309 helps. I think the jury is still out as far as whether or not that's helping their
 310 business. It helps drive them to take the course. I necessarily agree with
 311 some of the results that we're seeing.
- 312 Q11g What were the solution(s) to the challenge(s)?
 313 A11g Regarding length of training, we are actively right now breaking those down
 314 into some more video byte size discs that are perhaps more digestible. As far
 315 as the vendor, the solution around the vendor was essentially having what we
 316 call a come to Jesus meeting, with our management saying, "Hey, you guys
 317 are screwing up. We're experiencing some pain here." I wish they had
 318 acknowledged what was fixed, but they did acknowledge it. The other part of
 319 that solution with the vendor was just simply for us doing that design work,
 320 more of that design work.
- 321 Q12a What specific knowledge, concepts, and ideas that helped you?

- 322 A12a I was driving pretty hard earlier in my career Gagne’s model. The other one I
 323 kind of took a liking to was Kelly’s ARC’s model. Attention, relevance,
 324 confidence, and assess, right? I built learning event model and strategy. There
 325 was probably some message design and graphic design principal like around –
 326 I’m trying to think – proximity, color choice, contrast or the contrast going on,
 327 repetition, alignment.
- 328 Q12b What soft skills did you use?
- 329 A12b The people that I interviewed are primarily subject matter experts, field
 330 representative, master performers, those kinds of people. Those interviews
 331 were important, yeah, from content gathering to verification, just overall these
 332 are the people who were going to be part of the project and I work with them.
 333 The interviewing skill is not just asking the right questions. It’s really
 334 edifying those who you are working with, praising them for what they do kind
 335 of thing. It’s how to win friends and influence people 101. We are looking to
 336 them to learn their expertise as well as verify with what we’re researching.
 337 Weekly status reports, emailing back and forth around content clarification,
 338 holding designer review meetings, so that’s including the manager of
 339 instructional design, it could be my director of training development, as well
 340 as other key stakeholders within our organization. We internally we use
 341 Microsoft SharePoint to manage the project. It would actually house the
 342 timeline documents and subfolders and everything. We didn’t necessarily use
 343 it as a project tracking tool. We really kind of relied on the vendor to do the
 344 project management, because they are a team that really has more equal work
 345 than just myself and my immediate manager. But again, yeah, part of their
 346 communication tool was using – from their standpoint for a review tool – I
 347 think it was Clear Course or Clean Course type of product that they
 348 developed. Other vendors I’m finding lately leverage website service
 349 software called Base Camp. It is an online project management tool.
- 350 Q12c What hard skills did you use?
- 351 A12c Yeah, it’s not necessarily having the skills to develop, let’s say if you use
 352 Flash to its full intent or do you use Lectora to its full intent. I think you need
 353 to be very aware of the capacities of those tools so that you can design a
 354 proper interaction that is going to further learning. Beyond that, also to
 355 understand what type of environment are you working in, understanding the
 356 technical capabilities of your LMS, your deliver system, your server, as well
 357 as your end users. Because our end users, we cannot dictate what they use.
 358 Again, this is volunteer workforce so they can be working on anything from a
 359 little Pentium II to the latest and greatest Intel chip, everything. We
 360 essentially had to really make – I don’t want to say dub it down – but we have
 361 to cater to a very low common denominator. That’s not evident if, let’s say,
 362 I’m working in MMM. Say, “MMM, I know a typical machine I can build
 363 towards – in thinking outside of the box on how to handle some of those
 364 technical problems. I’m going to pick up a different company I served, SSSS,
 365 which is a special equipment manufacture association, out in California. I
 366 built them a sales course, as well, that was very video heavy. How we
 367 addressed streaming video was actually we purchasing third partner company

368 that would physically host that video on service throughout the country. So
 369 that if I'm in Michigan I would be served up that video from a physically
 370 close location with high technical capabilities, as opposed to the homegrown
 371 LMS sitting in Diamondback, California and SEMA's servers. So SEMA is
 372 only serving up the text while that video is actually being pulled in from a
 373 third party. Like YouTube, like you would leverage a YouTube video.
 374 Having a knowledge of those kinds of things I think is very critical when
 375 you're developing Web Based Instruction. Not necessarily the skills to do it,
 376 but I can say if you have the skills to do it you can tell it whether if your
 377 vendors are bullshitting you or not. Just because I can doesn't mean that's the
 378 right thing to do. You have to timeline your sources. You can't optimize all
 379 of them, maximize them rather. That's why we have vendors.

380 Q12d What attitude did you realize that was helpful for the success of this project?

381 A12d A positive attitude, our business is very motivational. Our audience, again
 382 when in design you got to look at your audience. Your audience is first and
 383 foremost as opposed to your own agenda. Our audience is a very positive
 384 environment. They will shut down if we come in there and say the beginning
 385 of training, "This training is being produced because you are failing." That is
 386 not going to go over well. It's not going to go over like it would in a
 387 corporate environment and more of a vertical organization as opposed to a
 388 horizontal organization which is... Yeah, we need to be very positive. We
 389 need to throw them the softball, essentially. When some of the vendors went
 390 negative, we just make fun of them. Yeah, it's like anything else, it is what it
 391 is and you move past it. The greatest thing about our company is that the
 392 values from which our company was founded on that we live gauntly, it
 393 makes you feel good. I never worked for a company before that I felt this
 394 good about serving my learners. My learning and the training I'm developing
 395 is actually changing people's lives. They are able to spend more time with
 396 their family or put their kids through college or maybe their wives and
 397 husbands out to dinner just a little more often. It is making a difference.
 398 Keeping an eye on that really helps us out when we are designing
 399 development training for XXXX. Attitude is probably one of the number one
 400 things.

401 Q13 Which year was the project? What do you wish to have known that you didn't
 402 know back then?

403 A13 I wish I would have gone with a different vendor. You can see a trend, can't
 404 you? I wish I knew more about the field, more about audience. Because
 405 again this is a volunteer workforce, it's extremely dynamic. Yeah, the more I
 406 would have known I could have been perhaps a little more diligent/realistic at
 407 some of the scenarios that I built. So really having that true understanding of
 408 whom I am designing and developing for. We got the information about our
 409 audience from our managers. But it's not like firsthand. We did focus groups,
 410 but again it's – it's just these little secrecy you hear everybody, and this is a
 411 new arena for us to go into. The design and developing and training for the
 412 field is a new task or a new gamble for the company. There are some growing
 413 pains organizationally. My management actually had 15 years of experience

414 in the field, as well as a very strong analytical experience. She did look at
 415 numbers and really interpreted the true meaning of numbers and what's going
 416 on. Yeah, with that kind of experience or knowledge, it probably would have
 417 streamlined things. Because from a personal standpoint, you always go to
 418 your manager and ask them for questions, you have some self doubt going
 419 there. For the other skills that she has and I would like to have, I think perhaps
 420 probably some more experience in statistics. Yeah. I think in looking at some
 421 of the research, I was having some trouble interpreting that fact that
 422 correlation is not always causation. I think I was quick to jump to conclusions
 423 around some numbers, whereas she would say, "Hey, look at these other
 424 numbers, that's indicative of something else is going on." Again, just the
 425 experience and her field but also her ability to look outside what was
 426 presented.

427 Q14 What are the other knowledge, skills or attitude which were not used in the
 428 above project but you used in other Web Based Instruction projects you led?

429 A14 No, I don't think so. I think maybe...I was thinking maybe the ability to sell
 430 my ideas better, which is the key when you are working with any... Yeah, so
 431 if I'm trying to convince my management that this is the way to go and we are
 432 at a disagreement, how do we get to an agreement. That can be a difficult
 433 thing to do. Yeah, it's kind of a selling skill. We used EPSS in this project.
 434 But other projects aren't necessarily all around a process. Some of the other
 435 projects are more around knowledge or access that knowledge at just in time
 436 basis can be very helpful.

437 Q15 Assuming you are hiring a person as a beginning instructional designer in
 438 Web Based Instruction, what skills are you expecting?

439 A15 Again, just probably sound instructional design skills, just really the basics, at
 440 least knowledge of capability tools and what they can produce in a more
 441 inquisitive nature, not to be just an order taker. I worked with too many
 442 designers and developers and they are just an order taker. Tell me what you
 443 want on this course or how to structure this course, as opposed to really think
 444 it through and increased learning and retention. In communication skills I
 445 would probably say those are the core, professionalism. Yeah, just from an
 446 instructional designer standpoint, some of the basics and at least knowledge of
 447 what tools can do, because you can always learn some of those things if you
 448 are a beginner. I mean you got to know all the other stuff like Microsoft
 449 Office skills, good communication skills, reliability, showing up and that kind
 450 of thing.

451 Q16 Assuming you are hiring a person as an experienced instructional designer in
 452 Web Based Instruction, what skills are you expecting?

453 A16 Oh yeah, probably all of the above in more detail. Someone who can lead and
 454 sell their ideas and probably more better communication skills, as far as
 455 providing direction to others. More experience is probably going to have a
 456 positional power over someone else perhaps or being expected to lead
 457 someone else, also the ability to implement a process or at least adhere to a
 458 process. Solid education for instructional design is absolutely necessary.
 459 Again, if we are talking at a degree level...bachelors, not to discredit the

460 Master's program. I don't necessarily put a whole lot of credit into a Master's
 461 candidate as far as employment standpoint, as much as I do what results, have
 462 they yielded in the past, true business results. I have worked with too many
 463 academics in a professional setting who simply cannot yield business results.
 464 They have to come to the table saying, "We move these metrics." So I'm
 465 interviewing them, right, if they said these things I would also follow up or
 466 ask them how they did it. They have to prove it, the ability to prove they did
 467 that work.

468 Q17 Which direction do you see Web Based Instruction is heading to?

469 A17 More byte size, I think more video per basis, I think mobile. That probably
 470 goes without saying anything. I think we are going to find more Web Based
 471 Instruction pervasive and easier and accessible. So it's going to be more of a
 472 pull as a top down push. I think there are going to be technologies and
 473 implementation techniques that are going to be right in front of you.

474 One thing is more convenient but also the other piece is going to be more in
 475 your face. So if you are working with a system and the system is seeing that
 476 you're placing an order for something specifically or you're not doing
 477 something, something is going to trigger and say, "Click here to learn more on
 478 how to do this or learn how to sell this product. We notice that you had a
 479 return on this." This is kind of a retail hat. But even in a production
 480 environment, if we see that the logic can be built in it and say, "Wow, I see
 481 that you have come to this help page for the third time in a row. Click here to
 482 view the training steps." I don't see this is happening, because that's
 483 expensive, isn't it? It is very hard. But I think we are getting there. At
 484 XXXX, we are actually developing some tools right now being part of a three
 485 year project around some of these more advisory type of tools, where the
 486 system is analyzing your business and your actions and it will alert you, "Hey,
 487 we notice that you are just ten products shy of the next big bonus check," or
 488 something like that. It lured you. If you're lured of this, what do you do?
 489 You go and check out, what do I have to do to do that and achieve that.
 490 That's where the training would come in. It's kind of neat and I am part of this
 491 project. Because we view training actually there is viewed as an added value,
 492 a competitive advantage because our training is actually getting better and
 493 better and better and getting more accepted in their field as opposed to say
 494 NNN or HHH, than some of our competitors are. We do have a competitive
 495 edge, so we don't let those things out just to anybody. But if you sign up for
 496 an infinite business owner you can do that, its \$56 a year. I am really
 497 impressed with it. We have a different business plan and a different
 498 compensation plan which is actually an unlimited compensation plan. You
 499 aren't limited to – people that you sponsor and the more you sell the more you
 500 get compensated. You move up in different bonus brackets.

501 Q18 What do you think an instructional designer should do in order to keep up
 502 with this direction?

503 A18 I think maintaining – keeping up with trade publications, new research, new
 504 technologies and plugging into other arenas of technology, not just your own.
 505 What I have been watching as late is some of the social media technologies,

506 so the collaborative technologies, either like blogs or other case management
 507 portals. The pains that I experienced when designing and developing – the
 508 designing and developing standpoint is almost easy to me, it's not that
 509 difficult. What is difficult is managing the project as a whole, managing
 510 different people, coordinating different people, relying on different people. I
 511 think the more that you stay current with that type of skill, which is obviously
 512 a soft skill, the better off you're going to be. I can pay a vendor to develop
 513 something for me, but it's more advantageous to me and it's higher paying to
 514 me to be able to have those analytical skills, those design skills and
 515 communication skills, as opposed to the coding skills. Because if I can spike
 516 it out and storyboard it out, I can send it to India and have it done for one-
 517 tenth of the cost than here in the United States. I could make a ton of profit on
 518 it. It is, just playing with tools and a lot of reading. I like instructional design
 519 because it's kind of a blend between art and science. The arts standpoint
 520 stands really for that message design history, the graphic design history of ID
 521 work. The science brings it to standpoint about what we know about what the
 522 brain can handle in the center. I've gone to ASTD a couple of times. I really
 523 want to go to more ISPI. I like the chapter ISPI meetings than the ASTD
 524 meetings. You can see more of a performance consultant level. I would just
 525 go to the local ones. Our management is pretty decent. I travel a fair of bit.
 526 It's not a big deal.

527 Q19 Anything else that was not covered in our conversation but you think is
 528 important?

529 A19 I guess I have been lucky and really passionate about doing this. I guess it
 530 was 1996 when I started working in ID. I really, really enjoy it. I really can't
 531 see me doing something else that doesn't involve this or doesn't involve the
 532 skills that I learned. I have somewhat a passion for education. Both myself
 533 and wife have become a life partner who has this type of interest is very
 534 helpful. I believe that the instructional design field can help beyond the
 535 corporate and kind of enter into more of the public arena. I think it's hard to
 536 argue against it. Here in America we have a failed school system that is built
 537 off some very old industrial age models, where us as instructional designers –
 538 someone like us would come in and look at what is going on and be able to
 539 craft different solutions more customized individualized instruction that would
 540 be far more productive and maybe cheaper than what the public school system
 541 is doing right now. Yeah, I think the public school system has failed us as a
 542 generation. Unfortunately, that translates into corporations suffering, for what
 543 that's worth. Anything else? No, I'm cool. If there are any other questions,
 544 feel free to jet them to me and I will respond pretty quick.

1

Transcription of Interview 009

- 2 Q1 Good Afternoon, thanks for taking time with me. Can you tell me your current
3 job title?
- 4 A1 I am between projects right now so I don't really have a job title. My last job
5 title was Instructional Design and Technical Writer.
- 6 Q2 How long have you been working in the current position?
- 7 A2 That was a short term assignment for about three weeks, that was with
8 XXXXX.
- 9 Q3 What's your age range: 25-35, 36-45, 46-55, and 56 above?
- 10 A3 46-55.
- 11 Q4 Would you say you are actively involved in instructional design?
- 12 A4 Yes.
- 13 Q5 Are there any other positions have you held before, that were related with
14 instructional design?
- 15 A5 Yes, prior to this I worked as a Training Developer and Stand-Up Instructor
16 for XXXXXX University and then prior to that I was independent contractor
17 doing a couple of assignment for XXXXX Hospital and XXXX Hospitals,
18 XXXXXXXXXXXX Services. I have had a number of Instructional Design
19 positions well even before I graduated from Wayne State in 1998.
- 20 Q6 How many years accumulatively do you estimate you have worked in
21 design/development for WBI?
- 22 A6 12 years or so.
- 23 Q7 In those WBI projects, how many years, accumulatively, do you estimate have
24 served as a lead instruction designer/developer?
- 25 A7 I would say maybe four years, depending on the project.
- 26 Q8a What's the major of your bachelor's degree
- 27 A8a I have a Bachelor's degree in Bio-Medical Communications. That is why I am
28 all focused in the medical background.
- 29 Q8b Did you have postgraduate education: Master's, or Ph.D.?
- 30 A8b I have a Master's degree from Wayne State in the Instructional Technology
31 Program.
- 32 Q8c Have you had any other training on instructional design?
- 33 A8c I have had various computer/software training, and I have been certified by
34 the GM University in Distance Learning.
- 35 Q9 What's the business nature of your current organization: business/industry,
36 education, government/military, health care, independent, other?
- 37 A9 Well my last project was with XXXXXXXXXXXX which is a Health Insurance
38 Company.
- 39 Q10 What's the estimated size of the organization you are working for?
- 40 A10 Good question, fairly large company, I would say at least 1200 employees, I
41 don't know. It's local, it's part of the XXX Health System, it's their insurance
42 branch.
- 43 Q11 Can you tell me a Web Based Instruction project you are very proud of or got
44 highly recognized? First of all, describe briefly what this project is about?

- 45 A11 Okay, I was tasked with converting an instructor led course to Web Based
46 Training.
- 47 Q11a How many team members in the project?
- 48 A11a On this particular project, I am talking about the project I worked on with
49 XXXXXX University, we had about 16 to 18 training developers. It's the
50 biggest project of its kind for XXXXXX University. They are all developers.
51 We had people developing instruction through various methodologies, self-
52 paced, webinar, instructor led and web based training. We were all designing
53 courses, I was tasked with developing three courses myself. We had like 25
54 courses and I was involved with 5 of those 25 courses. We had subject matter
55 experts we referred to. In this project, we were calling them Instructional
56 Leads. I had 2 Instructional Leads that I reported to and I would say,
57 depending on the course, 2 for every training developer so I would say close
58 to 24 or 25 subject matter experts. This was the biggest project of its kind for
59 XXXXXX University. We were developing instruction for a new financial
60 software package. We also had courses related to a New Human Resources
61 software package. And an SAP Branch as well. We had 25 courses in the
62 financial package and I would say 5 or so Human Resources courses with
63 about five more in the SAP. We started training in September and didn't
64 really finish up training until I'd say early February. We had thousands of
65 people across campus, everybody from Administrative Assistants to faculty
66 and Deans that required this training. It all depends on how they were mapped
67 out by their supervisors by which felt they needed to be enrolled in. None of
68 them were mandatory but they were all leaned upon heavily to say you are
69 going to be using this software package whether you like it or not, so you
70 better learn how to use it.
- 71 Q11b How long did it last?
- 72 A11b The planning stages started maybe 2.5 or 3 years before we actually brought
73 onboard some of the training developers and started actually doing the
74 training. It's a big university and things sort of ran slow. Three years from the
75 initial stages all the way through to the end. I was involved with the project
76 for a little over a year myself.
- 77 Q11c What was the project about, was it about how to complete a step, process, use
78 systems, or how to perform physical jobs, or change attitude/value?
- 79 A11c Everything, because depending on what they did at their job, at the very levels
80 of expertise with the new software.
- 81 Q11di Describe the project in a very high level (the process by stages)
- 82 A11di There were many stages that were worked on before I came onboard, in terms
83 of my work, I was tasked with outlining, developing, reviewing and
84 implementing, evaluating. Well, instead of a design, we basically stuck to an
85 outline for each course. It was more design for me as well as some
86 development and also testing. It was constantly under review by supervisors
87 and peers. I was involved and had to go back and follow up and revise
88 accordingly.
- 89 Q11dii Describe the project in as much low level (steps, tasks) as possible

90 A11dii Again I was given an outline template, then I would talk with my subject
 91 matter experts about what it is we wanted to accomplish with this course. And
 92 then I would go in design, write and submit to these subject matter experts at
 93 various stages making sure I was on task. It would be constantly reviewed, not
 94 only by my supervisors but by the subject matter experts. And then we would
 95 take that and translate into the delivery method, be it self-paced which was
 96 essentially PowerPoint or a webinar, which would involve scripting,
 97 producing the visuals of course. Then we would do the dry run. We do present
 98 it one more time before taking it out to the public, the actual learners. During
 99 the whole writing and design phase I was under constant review. I was
 100 involved with those courses on my own. Again, I had people review them and
 101 I would talk with other training developers because they were developing
 102 courses that were either, before or after my course and I wanted to make sure
 103 there would be smooth transitions between my courses and their courses. They
 104 had, it's almost like an organizational chart to read that laid out the courses.
 105 Depending on again, the learners were mapped out regarding their job
 106 responsibilities, they would take courses accordingly. If they needed 6 courses,
 107 they would branch out to those particular courses. Nobody necessarily took all
 108 of those courses, although they were all available. Well it makes sense to
 109 essentially go over the prerequisites. There were certain courses that were
 110 mandatory so to speak, and you'd go through those courses and get basic
 111 knowledge of what the learners were doing before they came to your course. I
 112 guess you could say that was part of the analysis, leading up to the course that
 113 I was developing. I develop the content of the course with subject matter
 114 experts. The gleam from the title of the courses was what the subject was.
 115 Again, if you wanted to see what courses were coming up before your courses
 116 and any courses that were after just to make sure there was a smooth transition
 117 and things would tail easily with each other. Again, it was reviewing their
 118 courses having them review the course. It sort of broke down the course in
 119 various steps or chunks. Sort of like a design template. Some of the courses
 120 are highly specialized, some are quite advanced too. We had a facsimile of the
 121 application itself, something we could play with from which we would take
 122 screen graphs and do step by step processes with SME. We pretty much laid it
 123 out in PowerPoint. We didn't really have storyboards. A lot of them were
 124 delivered in PowerPoint format. Again we used methodologies, the soft based
 125 course were all paged through the power point, we also had webinars which
 126 we used PowerPoint as a basis for the visuals. We had our subject matter
 127 experts in with the webinar. We recorded each webinar. I was the one writing
 128 the script for the webinar. I was a moderator for every webinar that I wrote.
 129 We had PowerPoint for some of the high level learning points, and then we
 130 would take them through demonstration of particular tasks using the
 131 application. Again this was recorded so they could go back and review it when
 132 necessary. I also did the communication. I was the one in charge of setting up
 133 the webinar, I was actually the on-air talent so to speak, and I would answer
 134 questions that I could, but we also had a subject matter expert there available
 135 to answer questions that I couldn't. We had questions built into the webinar

- 136 that they could respond to, and we also took questions from the audience.
 137 They could answer their questions right away, and we answered their
 138 questions, any questions we couldn't answer right away we got back to them
 139 via email. We did two webinars for each course that were designed as a
 140 webinar. They are the same content. We would sometimes alter the content
 141 depending on how the first webinar would go. There wasn't much
 142 implementation. We just put it out there for them. We organized these courses
 143 like a curriculum. XXXXXX University uses a system called Angel. It's an
 144 online registration system. The university already had that set up. It's their
 145 LMS system. We had our own learning management system for keeping
 146 things like our graphics, various versions of the courses we were developing.
 147 We used SharePoint for that. So we continuously update the status. What kind
 148 of the data that we were tracking? Again, various versions of the course, our
 149 questions, the graphics we would use. This was all within SharePoint. We
 150 didn't get to that kind of granular detail to report when and where. We had
 151 deadlines we had to meet and we had various phases. Deadlines had to be met
 152 on a regular basis. It's not like one final deadline. We had to have the outline
 153 complete by a certain date, we had to have our first stage of the PowerPoint
 154 done by a certain date. We had some training leads, sort of like Project
 155 Managers that were in charge of setting the deadlines.
- 156 Q11diii What event/communication marked the beginning of the project?
 157 A11diii There may have been but it happened before I came onboard. So when I came
 158 onboard, I just picked up and started working on it. I was among the first
 159 people of training developers to come onboard and we were automatically
 160 tasked upon, here is the outline and these are your courses based on your
 161 previous experience, or other projects you've worked on. They gave us
 162 material to read, some hand out projects. They were nice about easing us in.
- 163 Q11div What event/communication indicated the completion of the project?
 164 A11div They were continuing to evaluate, particularly Human Resources and SAP
 165 that were ongoing – well for a little bit after I left. Maybe even after I left
 166 there were still revisions because they are always getting new employees and
 167 new employees are going to need training on the system.
- 168 Q11dv What was your role in the project?
 169 A11dv That was designer, developer and instructor, moderator. I don't have to do any
 170 management of things. We had supervisors to do that.
- 171 Q11dvi What software and services were used?
 172 A11dvi They sometimes brought in outside contracts, I was an University employee
 173 when I was on this job, but occasionally they brought in a couple of
 174 contractors to help out with writing or some other things, technical support.
 175 They were there for like three months at a time. They would help to write the
 176 design document depending on their expertise, they would technical support
 177 or come in and write for a particular subject like Human Resources, hiring,
 178 firing those kinds of things. Not so much administrative support but actual
 179 instructional design, sometimes. I didn't do coordinating myself but there
 180 were other training developers that did have to coordinate with those people.
 181 Again what kind of coordination was depending on the courses that we were

- 182 developing and who were the contractors. Depending on the course the
 183 contractors were developing, the other courses, the developers would have to
 184 coordinate, make sure everybody was on the same page to make sure there
 185 were smooth transitions between the courses. Regarding software, we used a
 186 lot of Microsoft Office, Adobe Connect, SnagIt, SharePoint, and Visio. That
 187 was pretty much it. We didn't develop a sandbox for the learners where they
 188 could actually use a facsimile of the template to play. We did have courses,
 189 they could practice with a version or like a facsimile but only within the
 190 confines of the course. This is an instructor led course, we had a number of
 191 exercises that they would go in and they had certain parameters. This was the
 192 only time they could actually play with a practice version of the application.
- 193 Q11dvii What hardware and devices were used?
 194 A11dvii It was all PC based.
- 195 Q11e What were the outstanding features of this project?
 196 A11e Good team work, we had a great team for this project. Everybody helped each
 197 other out, there was no competition and everybody was very cooperative.
 198 There was a very strong team effort. Everybody, including the developers,
 199 team leads, subject matter, they all realized we were in this together and this
 200 was something that was going to help the university as a whole. Other than the
 201 team work, we stayed on task, we always got good feedback. We had an
 202 online survey for every course, and of course you could tell if you were an
 203 instructor on the instructor led course how people would take to the course
 204 content. That's pretty much the highlights. It was a good project, lots of good
 205 people to work with. I am sorry the university didn't keep us together to work
 206 on other projects.
- 207 Q11f Did it occur to you that you wish to have done the project differently?
 208 A11f It would have been nice if we did indeed have a sandbox for them to go in and
 209 play on their own, but they just didn't have the finances to do that. If I had
 210 opportunity to design a sandbox, I would have a practice application out there
 211 where they could try practicing their own real life situations, so it wouldn't
 212 necessarily affect the real system. I am talking about something that they
 213 could practice at their workstation. Like I said, the only other opportunity they
 214 had to practice was within the instructor led course.
- 215 Q11g What were the solution(s) to the challenge(s)?
 216 A11g Again we told them that, for starts webinars, they could look at demo. We also
 217 had practices, but we also had certain tasks on a website on the internet at the
 218 university where they could practice with certain tasks. I am trying to think of
 219 what they called these. They were simulations but they could sit there and
 220 watch or they could do step by step on these various tasks. These were set up
 221 with a program called U-Perform. So it's like a small piece of sequence of
 222 screens playing in front of them and they could also do certain tasks
 223 themselves. They were given direction on type your name in here, click on
 224 this. If they did it correctly they would follow along to the next step. I think
 225 that would add to software, the U-Perform.
- 226 Q12a What specific knowledge, concepts, and ideas that helped you?

- 227 A12a Well of course instructional design, training development, of course having
228 access to subject matter experts for financial knowledge. Writing of course,
229 some of it would be technical writing. I used the ADDIE model.
- 230 Q12b What soft skills did you use?
- 231 A12b You had to have good inter-personal skills, not only to talk to subject matter
232 experts but to also be an instructor. You present enthusiasm and proper body
233 language, and so on and so forth. We didn't have video capability, what we
234 did was we simply projected the thorough points and we would sometimes
235 switch to a computer screen where we demonstrated the application. During
236 the stand-up instruction, we used proper body language. So this is blended, it
237 has both outline, virtual and classroom training. All sorts of different
238 methodologies. Again self-paced, webinar, instructor led training and web
239 based training. Well being a good presenter, showing enthusiasm for the topic
240 you are trying to teach and being helpful and understanding with any and all
241 questions to be able to effectively demonstrate the product. I mean excellent
242 presenting skills. Well that's basically it.
- 243 Q12c What hard skills did you use?
- 244 A12d Yes, computer skills were real important. The writing. Organizational skills.
245 Resources, organizing your courses and sometimes you are working on
246 multiple courses at a time, multi-tasking skill. I was working on three courses
247 simultaneously. Two of them were advanced courses. It was assigned that way.
- 248 Q12d What attitude did you realize that was helpful for the success of this project?
- 249 A12d Good attitude of course, helpful, I want to accommodate my subject matter
250 experts, their schedules, because a lot of times they were working on their
251 own job, as well. Well just a Can-Do attitude. Be willing to get there as early
252 as you needed and stay as late as you needed. Just having the proper attitude
253 to do whatever needs to be done.
- 254 Q13 Which year was the project? What do you wish to have known that you didn't
255 know back then?
- 256 A13 It was 2010 until 2011. I would have liked to have known more about the end
257 users. Well they sort of did tell me upfront but it would have been nice to have
258 actually gone in and talked to some of these end users. So I wished I would
259 have met a group of users and observe them that would have been nice. I
260 would have just liked to talk to some of the end users just to get their take on
261 their skill levels, what their attitudes were, like what issues and problems they
262 are having now. So I didn't get an opportunity to talk with any of them, not
263 until we actually got into the instructor led courses. That's kind of a bit too
264 late.
- 265 Q14 What are the other knowledge, skills or attitude which were not used in the
266 above project but you used in other Web Based Instruction projects you led?
- 267 A14 I'm still waiting for the opportunity to learn some of the more advanced
268 applications such as Flash and some of the other web development tools out
269 there. Those are just personal things I would like to be able to get involved
270 with.
- 271 Q15 Assuming you are hiring a person as a beginning instructional designer in
272 Web Based Instruction, what skills are you expecting?

- 273 A15 Excellent writing skills, excellent communication skills, willingness to learn,
 274 basic computer skills, message design. And the ability to speak about
 275 capabilities things are even if they haven't used particular tools such as Flash
 276 or DreamWeaver or any of those things. But they should have an idea of what
 277 it can do. I'd like to think that they could be able to provide some good work
 278 examples. Previous teaching experience would be nice. To understand things
 279 like adult learning.
- 280 Q16 Assuming you are hiring a person as an experienced instructional designer in
 281 Web Based Instruction, what skills are you expecting?
- 282 A16 The ability to create good web pages, perhaps a little bit of online animation
 283 experience, maybe some video editing or audio production, or multimedia
 284 skills, like media production experience, management experience, project
 285 management experience, and people management skill as well. They should
 286 be at least a Master's degree, or more education beyond that PhD or EDD.
 287 Specific years of work experience may not be for the project, but it would be
 288 nice to have had two or three years experience.
- 289 Q17 Which direction do you see Web Based Instruction is heading to?
- 290 A17 More simulation, like Flash or video or any kind, hands-on simulation, and
 291 more job related. It depends on the budget of the project too, in an ideal world
 292 where expense just didn't matter, it would be nice to have all sorts of
 293 WiskBang, animation and simulations, practice sessions, sandboxes.
- 294 Q18 What do you think an instructional designer should do in order to keep up
 295 with this direction?
- 296 A18 Well there's always various web development applications out there that are
 297 changing all the time. Being familiar with Adobe Creative Suite would be
 298 helpful and programs like Flash, if you don't use them constantly, you are
 299 going to lose those skills. They are always changing these applications, too.
 300 Adobe came out with new versions of Dreamweaver and Flash and all these
 301 applications, and if you don't stay on top of it, or you don't have a company
 302 that is willing to pay you for the training to use them all the time. Microsoft
 303 Office is changing all the time, too. They keep adding features for the way the
 304 interface is operating. Some of the basics like being able to copy and paste
 305 and use a thesaurus. You should stay involved with a professional
 306 organization as well. As long as you are able to afford the membership dues
 307 and the cost of each meeting. They are all national conventions. I haven't been
 308 to many lately, when I was on the project over at XXXXXX University we
 309 didn't have any professional branches in the area. I'd sign up for various
 310 groups and I will take a look at the discussions on LinkedIn.
- 311 Q19 Anything else that was not covered in our conversation but you think is
 312 important?
- 313 A19 It would be nice if companies realized the importance of training and how we
 314 help not only the companies but the end users. We are part of a process that's
 315 involved in prevention. A lot of times it's more cost effective to throw your
 316 money toward preventative means rather than fixing problems once they arise.
 317 I'm just tired of the process of being a contract worker, I wish some of these
 318 companies realized the importance of hiring a full time training department.

319 Lots of companies are that way, that's why you don't see training department
320 in every company. Ideally I'd like to get back into XXXXX Support working
321 with either a major medical center or medical school helping them out with
322 their training needs.

1

Transcription of Interview 010

- 2 Q1 Good Afternoon, thanks for taking time with me. Can you tell me your current
3 job title?
- 4 A1 Yes, I am in leadership of professional development which means I am
5 working with management in developing management competencies
- 6 Q2 How long have you been working in the current position?
- 7 A2 About four years
- 8 Q3 What's your age range: 25-35, 36-45, 46-55, and 56 above?
- 9 A3 56 above
- 10 Q4 Would you say you are actively involved in instructional design?
- 11 A4 Absolutely
- 12 Q5 Are there any other positions have you held before, that were related with
13 instructional design?
- 14 A5 In some degree every position I have ever held has been involved in
15 communications, communications in product knowledge, product sales
16 training earlier on in my career to now more formally skill development since
17 80s.
- 18 Q6 How many years accumulatively do you estimate you have worked in
19 design/development for WBI?
- 20 A6 Really became involved in web based starting about 1997, and in 1998 I came
21 in board with a media company they were specifically developing interactive
22 technologies at that time beginning in CD-ROM based, you know program
23 based interactive content and then moved over into the web based material. In
24 that context style, I worked very early on with this SCORM development and
25 then participated in what it used to call PlugFest, a SCORM, we would go in
26 and experiment with a new set of standard, so I was involved in early
27 development of SCORM, I was there when they were writing the standards.
- 28 Q7 In those WBI projects, how many years accumulatively do you estimate have
29 served as a lead instruction designer/developer?
- 30 A7 All of them. I came over from interactive CD-ROM based development, so
31 coming from that direction moving into web based, I was already well
32 seasoned in the kinds of technologies that were utilizing
- 33 Q8a What's the major of your bachelor's degree
- 34 A8a Undergrad degree is fine art, my graphic artist my formal education in
35 undergrad, and that was before computer graphics, so we are talking painting,
36 sculpture, drawing.
- 37 Q8b Did you have postgraduate education: Master's, or Ph.D.?
- 38 A8b I got involved in business education, business theater, started working with
39 interactive technology in presentations. So back in roughly 1980s I worked
40 on one of the first interactive media discs for YYYY, a big disc, there were
41 like four phonographic records, besides video disc, they were interactive. I
42 would say the first interactive disc for automotive training, that was 1981. I
43 got my Master's degrees in 2001. And the reason for really going into
44 formalizing training is because the clients were more highly educated, I
45 needed to go back to take the formal education to be able to communicate

- 46 because I was very much involved in writing proposals and developing basic
 47 and creative side of the work. I need that background to be able to
 48 communicate with the clients. I have completed all coursework of my PhD
 49 program, and right now I'm in the process of qualifying for the doctoral
 50 candidacy.
- 51 Q8c Have you had any other training on instructional design?
 52 A8c I don't have any other certificates. But as I've mentioned before working very
 53 early on as the technology was forming, they wouldn't do certificates as we
 54 were still defining what was SCORM standard. So it's not like you can certify
 55 something you still evolved them. So it hasn't been important for me to go
 56 back and to be certified in those things. I have been consultant of teaching
 57 others in those things I have been called upon. I have done some training in
 58 SCORM and the implementation of consulting in that area.
- 59 Q9 What's the business nature of your current organization: business/industry,
 60 education, government/military, health care, independent, other?
 61 A9 Manufacturing.
- 62 Q10 What's the estimated size of the organization you are working for?
 63 A10 It's a good question, I did look back and find the number is 166,000, so it is a
 64 big company. It is a global organization, we are going to get to that. That's
 65 very difficult to identify the size of our group, I don't think anyone has a very
 66 solid head count. Even with the HR and I am part of HR, each our
 67 organization...it is split into formal hierarchical structure HR and then there
 68 are people in HR who actually embedded in the individual skill team, like HR
 69 people in manufacturing, so its reporting structure and how it is organized
 70 sometimes is difficult to get the straight number on that. The group I am in is
 71 about eight people.
- 72 Q11 Can you tell me a Web Based Instruction project you are very proud of or got
 73 highly recognized?
 74 A11 There is such a broad range and the kinds of the things that I got involved. I
 75 know we are talking today is web based and web base is one of the tools. So
 76 when I was involved there would be all of those components with either web-
 77 based or web delivered components be part of it. If I go back and look at
 78 something that was strictly just web, I can go back to some of the work in
 79 MM which was the competencies training. That particular project there
 80 received the Chairman Reward. It was a web-based delivered on
 81 competencies, it was on global launch tools and they were on the extremely
 82 tight timeframe and we needed to develop a web-based training material to
 83 support that. And basically the net result was the content was prepared in
 84 three weeks, delivered, out the door, done. It was a success and the ultimate
 85 result was receiving the Chairman Reward for that work. There's a lot of
 86 different aspects of that, they were fundamentally different approach to how
 87 the training was created and I referred to it a direct development kind of
 88 approach. And that can be done when you have a foundational structure to
 89 work with, within the fixed technology like we were doing. It involved the
 90 direct access, direct input by the SMEs, and yet bypasses a lot iterative type of
 91 stuff. It is not rapid prototyping, I don't do rapid prototyping. To me iterative

92 process is a hard sale in an organization, you want to be able to do things,
 93 build a foundation and move on and deliver, and have the right input at the
 94 right time in the process, knowing that the shelf life is relative short and the
 95 content needs to be on target and needs to fulfill everybody's needs and
 96 address the specific training needs as well. So in a direct development process,
 97 we utilized tools, we developed our shell, A and I worked through utilizing
 98 common tools that our SMEs could participate in, and without going through
 99 additional steps we could directly generate web-based learning content from
 100 the source materials. So that particular one involved lot of things - It involved
 101 rethinking how content is developed and yet working with existing framework
 102 of technology and the people in the organization and such. So that one was
 103 amazingly in a lot of ways in that regard. Yeah, you don't get a lot of time but
 104 you got a very specific window of time for to be done in. You can't have 12
 105 months processes, you know that's not the web world, and you need to have
 106 approaches that can involve social media type attitudes and approaches that
 107 content is not one person, and it's not developed through processes, it's
 108 developed through collaboration , and delivered to meet the specific goals and
 109 it's done in a format and can be modified and changed and maintained, so
 110 there is a sustainability aspect to it as well. So for one type of the course, that
 111 is huge. I'm throwing this out as well, this one was more blended, you know
 112 that one was a pure web based. A project that I went through very early on at
 113 my current job as I came on board with them. It was a very difficult time, I
 114 got involved in a separation training. Separation training is training for
 115 management on how they talk to employees who were being let go. Yes, it's
 116 tough, absolutely tough and the company chose to do the tough thing. The
 117 other company said, "Oh, whoever wants to go can go". Our company said,
 118 "No, we are willing to take a deliberate approach for that. And we are going
 119 to design an organization going through the tough times, so when we came out
 120 the other side, we have an intact organization ready to go." So in that process,
 121 there is a deliberate selection of people who were to be notified and let go and
 122 they could be there for 20 years and that they would be let go. So we are
 123 talking about a very horrendous, a very difficult type of thing to do, and all of
 124 that is all the things that going on needed to be addressed. In this particular
 125 case, I as an instructional designer was on the team of about 12 people. And as
 126 we sat in that room, around room that's it's kind of like this, none of us knew if
 127 we were going to be the target. So we are building a training for separation
 128 and anyone in the room could be gone in the next week, you know it was that
 129 kind of thing. What's so amazing about this project, there was a focus,
 130 understandably on the content of what needed to be done but when you take a
 131 look at something like ADDIE model, if you could imagine a roomful of
 132 people where that person was handling the analysis, that person was handling
 133 the development, which in that case would be me, another person handling the
 134 rollouts the communication piece of the implementation. So you had
 135 individuals that representing each of these components of the ADDIE model
 136 simultaneously, which is a wonderful illustration of how the ADDIE model is
 137 not a process, and the ADDIE model is an area of concerns area of

138 components that need to be addressed and accounted for, but it's not a process.
 139 While we were talking about the design, we were talking about
 140 implementation because they have to go hand in hand. There were
 141 components of it that were web-based, and there were electronic components,
 142 and there were podcasts that were done, and it involved everything that are at
 143 our disposal from the communication standpoint, to deliver and support
 144 management in this whole process and to provide the tools. We were dealing
 145 with the change curves in organization development, we were dealing with
 146 management directions and strategies, and all of this came in together and we
 147 systematically went through this whole process together as a group. And it
 148 wasn't like the instructional designer was the person, we were...I was one of
 149 the other people on the team. Each of us contributing, each of us having
 150 absolutely key role, but there wasn't necessarily one of us going in and
 151 making a final decision on anything. So again, highly collaborative, an
 152 amazing process, highly efficient. Again going back to this direct
 153 development type of approach, we couldn't go back, everything was very
 154 much time specific. As we went through the different elements of the change
 155 process, OD people looked at how we took the organization through change,
 156 and we were through it. Now, again there was a number of web based
 157 components to it, all of it had to do with instructional design from the
 158 communication theory, to change, to media, the tools, the right tool, the right
 159 place, the right time...all of that had to come to... so a totally different kind of
 160 approaches. But from the very beginning it was blended, because we looked at
 161 our toolkit, and what all of our tools had to communicate and support
 162 management activity. So it was performance support, we gave them the
 163 scripts, and the PowerPoint presentations to present where we were at in this
 164 whole process , and the enabling and empowering management at all levels to
 165 be a part of the team communicating the change to take place. It was born out
 166 of the time, that was the situation and it was the best of working situation I
 167 have ever seen. It was amazing. Well you were talking about web-based, I
 168 gave you one that is strictly web-based. This one deals with the whole
 169 blended the scenario of how ... You come together around the specific
 170 purpose and objectives with results needed to be achieved and you had there
 171 very skilled people - Almost everyone around the table had a doctorate. So
 172 we were talking about highly educated highly professional group that came
 173 together. Quite often in instructional technology, we take a very self-centered
 174 view of how things get done. For instance , Cennamo model of layers of
 175 negotiation, has the instructional designer running around touching all these
 176 bases, well, that's one way to look at it, but if you look at it from the team
 177 perspective, the person doing the researching won't cognize the model,
 178 because I am over there doing my stuff, you know and it is important and it
 179 has to be accounted for. And I was working at the capacity of a developer,
 180 and working through that perspective of it, another person working through
 181 from management messaging standpoint, each one of the group would see
 182 their particular area as very important. And if you would step back and look at
 183 that whole process from those different perspectives, you are going to get a

184 different model, as opposed to strictly like this Cennamo model of layers of
 185 negotiation. You would see each of these component, analysis, development,
 186 and we had one person strictly from corporate communications, okay,
 187 communications, implementation, that whole messaging piece was going
 188 alongside of it where it is supposed happening. So it does give you a whole
 189 different way of thinking in terms of how an instructional designer works with
 190 aim and organization. The other piece of this that you get into is you know
 191 the start and the end points. If you think ADDIE as a process with a start with
 192 a beginning, there was no start there was no beginning, we already had
 193 research data represented over here. I'm not going back and doing research or
 194 second guess them on what the research meant. So you pick up and it's like
 195 you're taking all of these different energies, all of these different work streams
 196 and then wrapped them around into a single focus now, and that single focus,
 197 the outcome is going to be learning, training and communications... all of this
 198 is going to take place. So all of this is happening, it's matter of focusing and
 199 providing direction. And by the way, once that series of communications
 200 ended, these people go away? No, they are still doing their research, they are
 201 still doing their corporate communications and they are still ...but now they
 202 are doing something else, for the time being we all came together as a team
 203 for a single outcome and that's a model we see more, at least I see more in the
 204 corporation, in a large organization where you have groups of people come
 205 together for focus time to deliver on a particular objective and they are going
 206 off to do something else or for short time they have other jobs too. So it's
 207 different kind of model. It's a different way of thinking about how things get
 208 done, and it is not an instructional design eccentric view. But it is the
 209 corporate and organizational point of view, understanding there's multiple
 210 perspectives involved and it's only on that understanding of that centric
 211 objectives the purpose that we are trying to achieve that this group is formed
 212 for the time being. So, that's how the group formed, the outcome becomes a
 213 very wide range of things, some of which were web-based. I would have to
 214 say the second one is the richest because it was broader, the other one was
 215 strictly a time challenge. That was all said and done in three weeks. But this
 216 other one because of the scope and richness, in really understanding multiple
 217 perspective in a project and working with the team, highly educated
 218 professional team through it, I know instructional designers to not always get
 219 that opportunity. And yet in the same time I would have to say in any
 220 organizations, there are good people and there is that understanding and
 221 developing respects for the team, mutual respect, not just respect for the
 222 instructional designer, but as an instructional designer for the knowledge and
 223 background and skills of different team member brings. You are not here to
 224 fix all that, change all that. But you're here to leverage that, to pull together,
 225 to focus for the time being, to achieve the goals thereafter.

226 Q11a How many team members in the project?
 227 A11 About 12 people, that's kind of the estimation. It was a fixed group. The
 228 people in that room represented a very specific aspect of the business. There
 229 was no fluff, because this security and the tightness of the topic, it wasn't open

- 230 for just anybody to come in, if you didn't have the reason to be there, you
 231 won't be there. So yeah it's very sensitive topic. It was very self-limiting and
 232 a qualifying.
- 233 Q11b How long did it last?
- 234 A11b. We were involved in that process probably over a 12 week period.
- 235 Q11c What was the project about, was it about how to complete a step, process, use
 236 systems, or how to perform physical jobs, or change attitude/value?
- 237 A11c It is this idea of working as a team, so there is that whole team aspect,
 238 understanding what the team is, and that team, a real team is not a committee,
 239 a real team is made of people who are experts in their own fields in their own
 240 area, using the analogy of football team - you have a quarterback you have a
 241 central you have attack. These are very specific jobs, people are there to do a
 242 very specific job, and as whole you form a team to achieve the goal. So
 243 understanding a team in that regard, in developing some of the take-away, you
 244 are talking about learning, some of the take-away is not quantity in the team
 245 that makes any good, it's about to have those specific skill sets represented in
 246 the team, and the personal responsibility of those individuals have to deliver
 247 the best they can on that particular feature or aspect. If you have a graphic
 248 artist on the team, they are there to bring in the best skill in illustration to
 249 design those elements. And you have a SME on the team, that person is there
 250 to provide the current validated data information. If for a team to work
 251 optimally, these people need be delivering on each of those. So understanding
 252 a team on that regard and then like I said there is mutual respect for the team
 253 to deliver. We had that in the other web based program, we had unique
 254 people there, each doing their own thing and as a team deliver the project on
 255 time. The difficulty comes if the instructional designer oversteps their ability
 256 and skills, or there is not enough respect or the SME does not deliver on time.
 257 Then the team breaks down. So, going back what it is, it is a set of skill, it is a
 258 framework, it is approach, and it's principle based not process based, it is a set
 259 of principles.
- 260 Q11di Describe the project in a very high level (the process by stages)
- 261 A11di Okay, processes have beginning, I have never started in the beginning, okay, it
 262 is always midstream. Within an organization, they've done the needs analysis
 263 in the past, they've done the stuff before, they do their survey, they do all of
 264 this. And if you look at it from what I do first, in that sense, I look at it,
 265 "Well, what do we know? I want to know what we've already known before I
 266 ask any questions." So you take a scan or survey of the landscape, and I use a
 267 concept map. On the concept map, there is something tangible that can be
 268 referenced throughout this program. So I lay that out. Again that's really a
 269 kind of information gathering, conceptualizing type of... So the analysis is
 270 ongoing. We have history, you know, they do engagement surveys once a
 271 year. So we can look at data overtime. Right now, I go in, its' like, okay, we
 272 need to do something in this area. Management says, "Oh we need some of
 273 this", and you go in, "Okay, that's an indicator, this is something we may look
 274 at it, work at", and now I'm coming together and look at it what we know
 275 about this, what are the matrix, what are information that could be available.

276 Looking at the team who needs to be involved who are the stakeholders. So
 277 you are going to look at it from that perspective as well. The other aspect of
 278 this is, again, there's tendency for instructional designers to the instructional
 279 designer centric, it is all about us. When I was part of the team, I was then let
 280 in on what was going on before, I didn't put the team together, that team was
 281 formed by my management. So even that aspect of it, you come in and be
 282 able to understand the whole mix of it. And understanding my part my role
 283 this time. Another time, it could be different. It could be more expanded.
 284 Here we had another people who ran the different expertise. Another time it
 285 might be four of us. We are going to wear from different kinds of hats. So
 286 when you talk about process, I can go back and say, "This is how that project
 287 was done", and the hind sight says, "Oh, this was the process you went
 288 through". On the other hand looking forward, I could not have laid out that
 289 process, I could tell you the principles by which we were going to operate.
 290 And the principles then helped us define next steps and things to move to do.
 291 But as this thing rolled out, we were constantly checking and double checking
 292 and going through it. So to me process is something you do in a hind sight. So
 293 processes are fine, to talk about what you did, fine for case studies, that kind
 294 of thing. But as you work, you have to have the freedom to be able to be
 295 productive in your thinking, to be open to your approaches.

296 Q11dii Describe the project in as much low level (steps, tasks) as possible
 297 A11dii Again, thinking through the different components, from the analysis
 298 standpoint, the survey work had been done in the past. And the research was
 299 both an internal knowledge but also the research was done across the board in
 300 other organizations who had gone through similar kinds of circumstances of
 301 what was done what happened. So, the analysis was both internal analysis but
 302 also external analysis of other resources of OD change processes and case
 303 studies and thing were brought to bear. So that was that pieces coming from
 304 the analysis standpoint. From the design standpoint, some of the things I was
 305 most directly involved was development of PowerPoint materials,
 306 development of web based training. We developed specifically one podcast,
 307 role play scenarios so we can demonstrate the expected behaviors of
 308 management. Again, this is absolutely horrendous, the videos we had to
 309 produce was as gut wrenching as you can get. It was very tough to film, it was
 310 very tough to edit it, because we role played somebody who had their career
 311 ended after almost 20 years. So the development elements...again that I was
 312 specifically involved in was podcast, PowerPoint, manuals and the job aids for
 313 the separation process. The design component again working from the
 314 expertise, other case studies and materials were done, we adopted a change
 315 curve model to work through, so went through the denial and that whole kind
 316 of process though final acceptance, all of that, as an model, then developed a
 317 series of communications based on where we anticipated the main body of the
 318 employees to be at any given time. And with the full acknowledgment that
 319 this is a model, do not confuse it with the reality that any individual could be
 320 any place on this line. But as the overall understanding, a way to step back
 321 into... allow management to take a more strategic view, and to give them

322 some tools to work with. The last thing you want them to go in is to say,
 323 “You are on your own”. It had to be a support all of that, in the design of that
 324 materials utilizing models, looking at the cadence, because we knew when this
 325 event would take place, we knew when the announcement was going to
 326 happen, we knew when this group was going when that group was going. By
 327 going I mean the task was going to fulfill. By the way task is a euphemism
 328 for the whole process. So we had from the design standpoint, the cadence that
 329 came from management. Here's when these things were going to happen. And
 330 working with communications and understanding in getting those materials
 331 ready, signed off, reviewed and ready to go, because it was absolutely this is
 332 when this is happening. So from the design stand point, understanding the
 333 timeline, understanding the messaging that needed to take place, and having
 334 the tools ready. From the development standpoint, doing the video shoots,
 335 getting the editing done, all of that. The implementation, understanding the
 336 formats, we had a global audience. We haven't touched on that very much
 337 yet, but web is global, period. Web is not regional. So web and global are
 338 synonymous. And if you've got a global issue, it's a web issue. So we were
 339 working through things like global English, that was not just happening in
 340 UFO, that was a major focus for us, that were tasks happening all over the
 341 world. And understanding how all of this have been communicated. We had
 342 those aspects as well. But I have gone off target, bring me back on target with
 343 your question. The implementations... again that cadence, that timeline was
 344 driving the development and driving the design, because we knew we had the
 345 six incremental times that we could go out, “Okay, what's the messaging we
 346 are going to design for each of those installments, as we go out with part of
 347 the story, and part of the story, building that communication over the time, the
 348 implementation was absolutely woven into the development and design.
 349 Because of that, the cadence and the timing and other events would be taking
 350 place, and so on and so forth. Then as the research that monitored attitudes of
 351 what's going on in the company, there was also a constant input. As we...
 352 okay we did this installment, how did it go? How did it happen? Did people
 353 get matured? Was there any issues? So between installments, we were able
 354 to adapt, modify, clarify and go on to the next installment, yeah, the next task.
 355 So we were able to work through again in a parallel structure over a very
 356 specific amount of a time with the very specific targets and objectives we had
 357 to achieve. And ultimately the metrics were evolved in keeping our
 358 workforce engaged. We still had to keep focused because we still had to get
 359 to work done even though the cube next to you is missing is empty. As with
 360 the evaluation, again, as we started from the analysis standpoint, we had
 361 global surveys that were monitored, the engagement surveys. Those were the
 362 metrics that we tracked as we moved along. And very much interested in the
 363 attitudes from the people about the company, and in the future of the
 364 company, did people believe where the company is going. It's hard to measure
 365 the duration of the training, because it is both communications and the
 366 training. But here were the pieces: There were e-mails, the official e-mails,
 367 announcements to management, dealing with just the training aspect of it,

368 there was a SharePoint website to go to for resources, so you had your job
369 aids, forms and the scripts that you were literally encourage to read because of
370 legal implications. For example, there was an instructions of not to say, "I am
371 sorry", it's admitting some kind of culpability here that I have done something
372 here. So there was very specific way of dealing with languages. So there
373 were scripts that were prepared, the verbalized walk-through of the manuals. I
374 produced that podcast role plays. So there was webcast, there was web-based
375 resources... those were the pieces and components over all there might have
376 been two or three hours material that actually they would've gone through.
377 And that there was different way of sign-up for it, like webcast for Q & A.
378 The podcasts were delivered for role modeling, demonstrations of what this
379 looks like, this is what it sounds like, we even got to what this feels like. It
380 feels bad really bad. Um... the podcasts were delivered both synchronized and
381 asynchronous. They were available in WebEx and they were also available
382 for self review. Because of the absolute fixed cadence, this things were
383 happening, there needed to be a lot of flexibility, a lot of opportunities for a
384 supervisor who had that responsibility to get as much support as they felt they
385 needed. And we wanted to make them to feel supported, there is material,
386 they are ways through this, this is deliberate... Don't go and be apologetic,
387 this is what's needed to happen. Let's just do it. Let's be respectful, let's keep
388 it to minimum, but this is a task we have, this is a job we have to do.
389 Understanding the separations weren't just for blue-collar, it was at every
390 single level of management. And it was exactly the same process.

391 Q11diii What event/communication marked the beginning of the project?
392 A11diii At one point in which I got involved, but it did not started with me. Did it
393 begin at some place? Yeah, the upper management decided that strategically
394 we had to make adjustments. Okay, so it started there someplace, and as it
395 came down, and the whole process was beginning to be understood by
396 management, they understood the very key component of this, to support this
397 process, then it became a learning aspect team to it. Do we need to go out to
398 do learning assessment to determine if this is a learning problem? Well, we
399 knew there was a learning component, but the scope of it we had to figure out,
400 but it absolutely needed to be a learning aspect to it, that is the whole learning
401 initiative taking place in management. So like I said when I came to the team,
402 the decision was already made. There was no one person per se making a final
403 decision, but there was a learning management lead in that process, who
404 called the meetings, set things up, so there was a coordinator involved in it.
405 But again at the level that we were working, we basically had to have a head
406 state, we had this person responsibility for communications, this person
407 responsible for... There was a lot authority within the room. Now it's not that
408 they didn't have people to report to, they did, just as I did, but again the nature
409 of the whole group was - we were doing things that we absolutely knew
410 necessary we have to do, here is what we are going to do. And there was a
411 reporting to upper management beyond that of here what's taking place. But
412 throughout that whole process I never saw anything that we were doing

- 413 changed because of upper management someone else made a decision, which
414 is amazing.
- 415 Q11div What event/communication indicated the completion of the project?
416 A11div There was no celebration. At one point, we did last communication, and we
417 stopped meeting. The kind of event this was, the nature of it, it wasn't
418 something we had to go back as a group. The content is still out there, but as
419 we came through the event, the task, it was meant to be a one time event. It
420 wasn't meant to go beyond this.
- 421 Q11dv What was your role in the project?
422 A11dv In this particular project, as instructional designer and media specialist really,
423 I worked with different groups, in documenting and producing content. I did
424 all the graphics for the change process. I did videoing, I did video editing.
425 Again because of...within this very tight group, the less people involved the
426 better, more efficient, but also with better control of communications and
427 information as being delivered. So very tight from that standpoint. My role in
428 that was working through the adaptation of the change curve, incorporating
429 company terminology into it. And then working through assisting each of...
430 you know, from the communication standpoint, from the technical standpoint
431 as well, from the content standpoint, how this stuff measures, so there is
432 continuity of all of those pieces that went out. So I was involved in
433 continuity, I was involved in technical assistance, I was involved production,
434 and again because of my background in graphics, I could profile that role as
435 well. I did video-graphic, not photos. I was the one shooting videos, as well
436 as directing, uh, scripting, it was a team effort, but yes I involved in the
437 scripting aspect as well, turning dialogue into role-playing videos, and how
438 does all this fit, how do you break it up. We identified the actors, the person
439 playing the employee who was let go was actually from an outside consulting
440 firm. And he did a very convincing job. So yeah we brought in an outside
441 vendor assisting us in this whole change process. We had an outside vendor
442 as well for consulting the separation, primarily they focused more on the next
443 steps, providing counseling to employees who had been separated. In this
444 particular project, no budget, because it was internal work we did because of
445 the intensity and the focus of it. We did have outside vendors but I did not
446 work with them, that was done at a higher level. Even within this group the
447 vendor was chosen above that.
- 448 Q11dvi What software and services were used?
449 A11dvi We were using the existing platforms, in this case SharePoint which was
450 already implemented within the organization. So from the server space all of
451 that the materials were already available to us. Frankly, a lot of things we do
452 now is leveraging the existing platforms. We are not going out, the company
453 is not going to buy something just because ISD said, "We need to be doing
454 this". The software we used... for the video production, at that time we were
455 using Camtasia or Captivate, basically just streaming videos together. And
456 now I use Premier for all the videos, which is a very solid, a pretty good tool.
457 Basically we used Adobe Master suites, such as Soundbooth for audios,
458 Photoshop for graphics. I had to bounce around between Fireworks, Freehand,

459 illustrator, Photoshop, After Effect, all of those things. All of those tools from
 460 development standpoint are fair games in a blended approach, all of those
 461 elements came together to create whatever message needs to be done. The
 462 design documents are typically done in Word, although that varies. And I use
 463 the term design documents very loose, the preliminary work, if you will, is
 464 where you are going into and set up, you know, here's where we are going.
 465 Sometimes is referred to as contracting, and contracting and design documents
 466 are very closely related, contracting being that very initial setup of your
 467 objectives, you got to sign-off from the stakeholders involved, that then kind
 468 of goes into the other design work and elements. I personally work in
 469 whatever the customer's working with at the time, sometime it's Excel
 470 sometimes it's PowerPoint, a lot of work was done in PowerPoint because it is
 471 the most ubiquitous tool that people use. You know you work with engineers
 472 it's going to be Excel. So it can vary. The most formalized piece of the whole
 473 process is not the design document but the contracting tool, the initial project,
 474 and that's more done at another side. In my area it's a lot looser than that,
 475 typically I find myself from tool standpoint, it's actually more Microsoft
 476 Word. Personally I spend more time directly at SharePoint. My deliverables
 477 were rolling deliverables, going back to that separation process, because of
 478 that cadence of weekly communications that went out as we prepare for that,
 479 the deliverables consisted of the communications, the link to support
 480 PowerPoint, and links to supporting podcasts, and other instructional materials
 481 to go along with it. So it was this cadence what was established and then the
 482 cascade materials where supervisors were then given materials not just for the
 483 communications to those being separated, but we spend a lot of time with the
 484 communications support the company supervisors to talk to those left behind.
 485 Because they still have work done and they needed to be understanding as
 486 well with those who were survivors if you will in the whole process. And that
 487 could be a lot of guilt, we understood this. So there was just the single event
 488 we were supporting in training but also the ongoing process training that went
 489 out incrementally. From the deliverables standpoint, there were incremental
 490 installments walking managers and employees through the whole change -
 491 how to stay focused, how to stay on tasks when everything is changing and
 492 shifting, so those were the deliverables.

493 Q11dvii What hardware and devices were used?

494 A11dvii From the hardware standpoint, yes, video cameras. Video editing, that's
 495 hardware and software. They was lighting, staging, studio, backdrops, pops,
 496 drapes, all of that, you had the camera equipment itself. Laptops as well for
 497 immediate digital storage. We captured 2AAs at that time to videotapes, we
 498 also captured to hard drive directly. Other hardware? Of course video
 499 projection. If you want to call web hardware, of course , a component of it is
 500 server. WebEx, you have microphones. You got conference calls so you got
 501 telephones. So a number of different kinds of hardware utilized to support
 502 that.

503 Q11e What were the outstanding features of this project?

- 504 A11e Um, one...I mean, from a contextual standpoint, the importance of the
505 training is extremely high, higher than anything. I've done product launch
506 tours introducing new car products, multi-million-dollar tours, those are pale.
507 Those are kinda weak in comparison to the people's lives they were dealing
508 with here. The cost of error, not getting those right, helping an organization
509 through it. I'll just say the importance of a particular program, sets it apart
510 uniquely from anything else I've ever been involved in. That made it unique.
511 The focus of the group, the intensity of attention, and working through the
512 level of skill that was represented in the room, is higher than anything I've
513 ever experienced or worked with. The absoluteness of it. You know, we have
514 the cadence, we have the timings of how this was to roll out, was to go,
515 although other programs have had that. When you do live feedings and shows,
516 you have absolute deadlines. You don't *not* show up for a show. You know, it
517 happens. So I've been in...I've been used to those kinds of timetables before.
518 And typically we do multi-million-dollar tour in three months, development
519 time. I mean, that would be a common thing, with absolute deliverables and
520 that issues go through it. But yet this was from a standpoint of a delivering
521 and ongoing communication. It wasn't a matter of just delivering and that's it;
522 it was delivering and hearing back and delivering and hearing back and
523 delivering. So it's a conversation with our audience, although it's represented
524 by different people in the room, it still was a conversation that we had in the
525 learning process. So we were learning as well over the timeframe. So that was
526 some unique feature as well. So looking back, if you can just set aside how
527 bad the situation was, it was an absolutely exemplary way of doing training
528 and communicating and thinking it through the whole communication process.
529 So there are a lot of unique features to that, that I don't know is, when you
530 take a company the size of YYYY, what was going on, what was happening,
531 um, unless you look at MMM and HHHH, you know, where you are gonna
532 see something, you'd have a whole different approaches to do it. So I think
533 there is a uniqueness even in the scale of scope and the approach.
- 534 Q11f Did it occur to you that you wish to have done the project differently?
- 535 A11f We didn't have to do it. Haha. That would be the issue—that we didn't have
536 to do it. There was a sobriety, a... We weren't making jokes in the room, it
537 was a very severe time, um, and yet, there was professionalism throughout the
538 whole process. So what would I change going back? Now, I would not have
539 changed anything in that whole process. I've been getting into discussions
540 with some people about, you know, YYYY chose to do deliberate separations
541 as opposed to just handing out invitations, who wants to go, and, as hard as it
542 was, it was extremely important for YYYY to do that, so that they were taking
543 an active role in their future and not leaving it to chance. And managing
544 through it, they weren't just taking whatever. So, um, no, in that particular
545 case, I...it was tremendous learning, to see all this worked and it worked.
- 546 Q11g What were the solution(s) to the challenge(s)?
- 547 A11g Not applicable
- 548 Q12a What specific knowledge, concepts, and ideas that helped you?

549 A12a I've been addressing a lot of that along the way, and to go back to... Models
550 are good to understand how things happened, how they took place, and
551 hindsight. If hindsight was truly 20/20, then it gives you foresight. You
552 know, if you look back and you look at what was the process, how did that
553 process work, you can go back and look and understand. But if you take and
554 impose a process rigidly, I'm saying rigidly imposing a process on a new
555 situation, you're gonna run into trouble. So it's about the principles that you
556 draw from what went on before. And you take those principles, and if those
557 principles are solid, and ADDIE has tremendous solid principles involved, and
558 it's not just instructional design. I don't care what industry you go to, they will
559 have a form of the ADDIE model, because those components are universal.
560 It's understood. Different names, different groups do it differently, they will
561 add another this or that or whatever, but it still is exactly the same thing. And
562 if you understand the principles, just like Merrill first principles, if you
563 understand those principles and how those principles work, then you are free
564 to create a process that's applicable and appropriate for the next project. So
565 ultimately it's about the principles, not the process. Process is something you
566 look back at and document, a principle is something that allows you to go
567 beyond, to address a specific need. So that's a huge piece: principle-based
568 design and development, OK. Um, another aspect of it is the experience base.
569 You have to have a tool kit. Just having a list of principles doesn't get you
570 there. If I hadn't already been able to do video-editing—as I've done video-
571 editing in the past, it's been a long time with video—when the time came, I
572 was ready to pull that tool out and apply it. When the time came to do a
573 PowerPoint or whatever, I wasn't going off and learning it. I could apply it. I
574 had that in my tool kit. When we started to talk about the change curve, I
575 didn't have to start to learn that. I could pull that out, you know. So cognitive
576 tools, skills, abilities, um, have to be readily available, you know, and become
577 a factor. The old story, you know, if all you've got is a hammer, everything is
578 a nail. You know, you are gonna hit it with this hammer. And web-based
579 training kinda became that hammer for a while, because people got taught,
580 here is how you do web-based training, so everything is web-based training,
581 everything is a hammer. This was not about web-based training. Did we use
582 web tools? Absolutely. Did we do video podcast and all those? Absolutely.
583 Did we use email? Absolutely. We used all of those things. So that experience
584 base needs to be broad enough to be able to accommodate using the right tool
585 in the right way. So this is an experience base that was very much a part of
586 how that program came together. Understanding the principles and having an
587 experience base to apply were key components of that. The purpose and
588 objective, having a very focused purpose and objective, that was the key for
589 management. We all understood it. So you know, having principles and
590 nowhere to go doesn't do it. Having all those wonderful things you can do—
591 well, "I can do Flash," I can do this, I can do that—um, you have to have a
592 purpose. So key component is, then, the strategic positioning or purpose and
593 direction for that. Um, another key element of it is, even though my
594 experience base was very broad, there was still people in the room that

595 hadn't...things that I've never been exposed to or worked with. People from
 596 the other D-side that had elements that they brought. So understanding both,
 597 having a lot to draw, to bring to the party, but also understanding and
 598 respecting what other people have. You know, and being able to leverage
 599 other people's intelligence, experiences, and knowledge is a key component as
 600 well.

601 Q12b What soft skills did you use?
 602 A12b A huge soft skill that is needed in any kind of group work is ability to listen.
 603 As Al puts it, if you come into a situation like you know it all, you are at a
 604 great disadvantage. You have to approach things in a willingness to learn,
 605 willingness to grow. From an instructional designer's standpoint, a very key
 606 soft skill is the ability to keep learning. And that learning from all those in the
 607 room, your SMEs, your other people that are there, that openness is a huge
 608 soft skill in this. I quit and go to the people doing the analysis, saying "Oh no
 609 no," you know, "I've got to do the analysis," you know, that kind of flair. I
 610 mean, literally, this person had their doctorate too. It's like, "Okay," um. But
 611 regardless of who that may help, there still is understanding the instructional
 612 designer doesn't have a corner on any of this. There is this openness, this
 613 attitude of continually learning, continually leveraging those people around
 614 them. If all you bring is yourself, and all you walk away with is yourself,
 615 that's pretty small. But if you come in and you add to, you leverage and work
 616 with those broader skills, that's huge. So the idea of continual learning and
 617 listening is a huge skill that's needed in that. And we address this a little more
 618 formally: we talk about knowing your audience. We talk about audience
 619 analysis, but don't leave it just as the student. Think in terms of everybody on
 620 the team, and learning and understanding how you work with them, how you
 621 leverage it. So, from a soft skill standpoint, that's huge. Another soft skill is in
 622 the cognitive abilities. Just the logical thinking. To be able to organize,
 623 simplify, that whole cognitive process of gathering, seeing how the dots
 624 connected. Because we have a role of producing continuity, of pulling it
 625 together, of making a cohesive statement, out of all those pieces. So there is a
 626 tremendous soft skill if you will, of being able to think, and think about the
 627 content. Going back to... And those are all inter-related, because inherent in
 628 thinking is perception. And to be able to listen, perceive, you have to know
 629 where you are at, what baggage to bring, the mental models you have, you
 630 know, all of that stuff. In order to think clearly about that topic, you do have
 631 to understand yourself. So understanding, you're still growing, you're still
 632 learning, having that attitude and approach, cognitive skills around
 633 organization, and then there are skills around perception, to be able to
 634 perceive widely and clearly, more clearly, is absolute key. You go into this,
 635 into some of the ethnographic studies, you have to understand *self* before you
 636 can understand *else*. If you go into it and you haven't understood where you
 637 are coming from, how are you going to understand where they are coming
 638 from? And how do you differentiate between the two? So there is this soft
 639 skill of understanding self, and your own baggage and stuff and whatever that
 640 you bring to it. So there's *that* soft skill. Absolutely necessary. There is a soft

641 skill, if you will, of expression. You have to be able to express yourself to the
642 group, If something is not good enough and I see it, I'm thinking about it, but
643 I haven't been able to persuade you, I haven't been able to present or talk...
644 So there's an absolute need for the soft skills to communicate. Some would
645 group all that into one and say communication is two-way and we'll call it
646 communication, and yet to really understand what's going on, there is this
647 ability to express oneself, both ways, not only to receive and hear and
648 understand, but also to express in a way that's meaningful—goes back to
649 understanding your audience, what's the language of your audience, how do
650 you communicate to them—and it can be literal and figurative. I mean, if I
651 knew your native language, I could communicate to you better than we are
652 now. But I don't so we can't. Um, so there is the ability to communicate. And
653 frankly, this is totally on the side, if I was looking for an instructional designer
654 in web-based training, I would look for a bilingual person, because they
655 understand communication in a way that's richer, deeper, and fuller, and
656 because we're working in a global community when we go on the web. We
657 get caught up in thinking in terms of *here* and this is my audience, but a
658 bilingual person would have that breath of knowledge and understanding that
659 the world is a lot bigger than just who is sitting here in a room. So there is a
660 lot of insight that a person brings, who is bilingual, along...I know you would
661 be, but believe me, it's absolutely a key element. And that person can think in
662 ways that I can't. OK, I study Spanish, but I'm not bilingual. But I know
663 enough of what other languages are like to know that there is a richness there
664 in a way that things are perceived, expressed, and talked about, that is broader
665 than what I just had in English. So you know, if I was really putting through
666 it, who would I hire, I would definitely look to someone in a bilingual stand,
667 because they appreciate and understand things that are needed for global
668 English. Even if we are talking about English, they would be much more in-
669 tuned to those particular challenges and issues, because we truly do have
670 global audience. I cannot, in that work that I do is web-based... I always have
671 to be thinking about how it's translated, where does it go, how does it happen.
672 It will be translated. It is. Web is not U.S., if not China. It is a global
673 community. And we need global people developing for a global medium. So,
674 you know, there is that, and that was just on the side. Could you put that in as
675 a straight competency? I think it allows you to explore some ideas about what
676 is a web developer, and as a web developer, what is involved in a global
677 community. A web developer has to have a global way of thinking about
678 things. It's a whole perspective. It's different. The whole way of approaching
679 the medium. There is a sensitivity to it, that a person who's born speaking
680 English, working in an English environment just doesn't appreciate. And
681 that's a whole other funny thing regarding British and American English
682 because we get into issues with that even among English. I work regularly
683 with Australian, European English, and American English, and it's all...you
684 know. The point was that the web is global. You need global mindset, global
685 people to use the tool effectively, globally. Otherwise we alienate, we isolate
686 different populations, because we're writing—again, part of this goes back to

687 understanding self, you know, that understanding particularly my perspective,
688 my blind-spots. There are things that I don't see because of that, and it doesn't
689 make my particular perspective wrong or right, it just recognizing that there
690 can be differences there that I'm not aware of or sensitive to. When we get
691 into culture and talking about culture, it's absolutely fascinating from a
692 corporate standpoint. One of our vice-president talks about when they were
693 hiring people and—I think it was in China, an Asian-Pacific area—they
694 thought if they go out and hire local, you know, that would solve all the
695 problems. And what they did was they went out and hired people who acted
696 just like the people in our company. They found them, alright? They went out
697 and found Asians that acted just like us. They failed miserably, because they
698 weren't...within any cultural group, you have a whole range. It's not like a
699 culture is *this*, a culture actually has a range and what you've identified is the
700 median of that, and you can find within this range, you can find people just
701 like me, and I can hire them and I did that, but they totally missed the whole
702 major population within that and those people failed because they acted just
703 like the people in our company. You can find the same people wherever you
704 go in the world. You can find the same people. Now predominantly they can
705 be different, but understand that. You can't say that the Asians are all this
706 way, Westerns are all this way. We're not. They're not. So there is that whole
707 aspect, but back to the point, web-development. At least the area I worked in,
708 web means global. Synonymous. And thinking in terms of what skills sets are
709 needed in a global medium is a key element. Any instructional design, really.
710 Again, web-based designing is specifically global, but any of the
711 communication that I do has a global audience. I would like to... There are
712 soft skills involved... I'll use an analogy or example of Flash. We're talking
713 about people learning about Flash, right? We learned this through MMM. And
714 it's like you can take an instructional designer... There're 3 things you need to
715 know to be skilled at to do Flash. You need to be a programmer, need to be a
716 graphic artist, need to be an instructional designer. Those are three very
717 different, very unique kinds of things. And I would always say, give me two
718 of them and I'll teach the third. If you're a programmer and instructional
719 designer, then ok we can help you get through the graphics end of it. And if
720 you're an instructional designer and you know graphics, we can help you get
721 through the programming piece of it. But if you are a programmer, trying to
722 teach you graphics and instructional design, that's not gonna happen. So
723 because the tools are so integrated now, the technology, the aesthetics that
724 need to go along with it, as well as the good design, all three of those things
725 have to happen together. So where do those people come from? Um, I came
726 from it because I came through the graphics end, and I was fascinated with
727 programming, programmed my first multi-screen, multi-image show in '81. I
728 was working for an agency at the time and we had just gotten in some new
729 equipment to do multi-image, multi-screen slide work, and I started learning
730 programming on my own. Again it was like back in '81. Actually, it goes back
731 further: I learned my first basic programming in '73. But I had this fascination
732 with art and programming. I came back and got my Master's in instructional

733 design, I had... okay now we have the marriage of technology, aesthetics, and
 734 good instructional design. So you know, Cannon designer, not have graphics
 735 well, yeah? That's where again, you know your limitations, or you work with
 736 someone on your team who is highly skilled in that area and you work
 737 together, so you build a team based on that. If you don't have that skill, there
 738 are ways to make up for it or to fill that gap. Understanding that you have to
 739 have technology expertise, you have to design, the instructional design
 740 expertise, and you have to have the aesthetic expertise. And the aesthetics can
 741 be in music, I mean in every element from a multi-media standpoint that goes
 742 into it. Video, flow-editing, those kinds of things get into it as well. So you
 743 have three hats there. Does it have to exist within one person? Not necessarily,
 744 but you have to realize if you are not a graphic artist, don't use clip art. Get a
 745 graphic artist. Or if you don't know the technology, get someone who's in
 746 technology to build that team. And frankly the strongest team has each of
 747 those components in it. You've got someone to account for the aesthetics, the
 748 beauty of the whole piece of the process, the flow, the instructional design that
 749 has the fundamental foundation of the learning process that's established, and
 750 from technology standpoint, make all that work. Now, an instructional
 751 designer that has interests in multiple areas and wants to develop and go to
 752 meet that makes them stronger and stronger, always recognizing where their
 753 weakness is in, and where they can. To do really outstanding work, really
 754 should be a team. There is a strength in being able to communicate the
 755 elements in a team. If you don't have a team, get a white board. Draw it out,
 756 work out here, so you can get back and look at it. You know, storyboarding
 757 those things, you need to do that. But if you have a team, where you can go
 758 through that process of expressing your expertise in each one area, then you
 759 can build this off of that and put together a program that really takes
 760 advantage and goes beyond what you can do as an individual.

761 Q12c What hard skills did you use?

762 A12d Hard skills, technology, whatever that is, video, apps now, gotta know apps.
 763 The web now is apps. So what is that animal? We before used to have flat
 764 pages, you know. You publish through the web pages, bang. Now, what we
 765 are publishing is applications, apps, not too different from what we are doing
 766 with Flash. When we were working with Flash, we had all these things going
 767 on, well, think in terms of now, we've got all these web apps. We've got all
 768 these smart phones apps, right? That's what we're doing now. So from
 769 instructional design, you better understand the technologies to some extent,
 770 and do you have to become an expert in it? You better be fluent in it. And you
 771 then you buy or hire whatever the expertise is to get the work done.

772 Q12d What attitude did you realize that was helpful for the success of this project?

773 A12d You better be excited about it. Passionate. You better be excited about the
 774 opportunities. Again, it's looking forward to what hasn't been done yet, could
 775 be done, should be done, making a difference. That's absolutely key. Going
 776 into a project, you better feel like there is an opportunity to make a difference,
 777 and to be able to just have kind of the excitement about it. I just have a lot of
 778 fun with this stuff, you know. And trying to get people to see potential is a

779 huge challenge that I have, just day to day, outside of a specific project, is
 780 helping people to understand the opportunities we have now that we haven't
 781 had before, with information, and being able to help people do their jobs—
 782 that's a huge challenge. We haven't even touched on social media and
 783 informal learning. Basically...there is an irony within YYYY, of course,
 784 YYYY was way ahead of other companies in social media marketing
 785 standpoint. Introduction of the KKKK was all done through social media.
 786 Before any products in the country, before anything they had established in
 787 social media, in roads. And it was very successful. Internally, we're still trying
 788 to figure it out, IKEA is doing some work, presenting and making available
 789 platforms for social media, like Amer, is one internal one. It's still casual,
 790 there's nothing informal, but I use the term "casual" because it really is
 791 casual. It's not just informal, it's just like what's your favorite pad...
 792 (Microphone fell off) It's going to come back around to "What's the purpose".
 793 Again, you have all this ongoing activity. It's about understanding how to
 794 focus and harness activity in meaningful ways, to achieve instructional and
 795 learning objectives that we have. And that's a challenge going forward: how
 796 to harness all this activity. We're not make it happen, we're not gonna force it
 797 to happen, it's not gonna be legislated, gotta jump in, swim with them, and
 798 understand how to focus.

799 Q13 Which year was the project? What do you wish to have known that you didn't
 800 know back then?

801 A13 It would be 2008, 2009, something around there. The whole down turn, yeah.
 802 2008. I want to know it all. Again, through that time, I was still going to
 803 school, you know, there is a lot of things that I've learned since then based on
 804 some studies in my cognitive psychology, specifically in that area
 805 understanding more of culture—what culture is, where culture exists, some of
 806 those insights now I can work back and see, you know, some things make
 807 more sense now, even, how things worked. But yeah, still learning. The
 808 concept of culture, shared knowledge, because we are talking about an
 809 organization going through change. And that shared understanding, trying to
 810 move people together, understanding that everybody moves independently,
 811 you can't assume everyone in anywhere is gonna change and yet at the same
 812 time, working with them, supporting, communicating... There was a lot of
 813 insights that I gained through those particular studies, which helped me
 814 understand more of what went on during that time. There's, anyways, you
 815 don't know it all. Back to the first point, you open to continual learning,
 816 knowing that you don't know it all yet. Even having gone through that, that
 817 whole process, the challenges now is how do we get back there, how do we
 818 create that again, how do you orchestrate that kind of focus without the
 819 problem, without the intensity, but to gather group together around a focus, to
 820 bring those expertise there. So yeah.

821 Q14 What are the other knowledge, skills or attitude which were not used in the
 822 above project but you used in other Web Based Instruction projects you led?

823 A14 I'm gonna go back to the same principles. Again, working through all of this,
 824 understanding what all the fundamental principles are that you're trying to

825 achieve. No matter what, context is still exactly the same. The project that was
 826 done at MMM with the direct development, at that time we were using
 827 Microsoft Word, we had SMEs directly participating in that content, we had a
 828 methodology that content didn't need to be produced and was produced.
 829 When we got out of the room, it was done. Or when we came back, we had
 830 more. It was just... Those fundamental principles, direct development of
 831 collaboration, of single focus, specific timelines, deadlines, you know, those
 832 kinds of fundamental aspects are consistent throughout every successful
 833 project I've seen. If you remove or don't pay attention to one of those
 834 principles, then project funders. It gets off-track, it gets out of focus, you don't
 835 get the attention, the SMEs disappear, you know. But if you can keep things
 836 tight time-wise, keep things tight from a outcome standpoint, the quality goes
 837 up, even though the time is shorter, quality is up, because quality is not just in
 838 rich media. Quality's also in on-target, time maintenance. At MMM we could
 839 get out anything on time. Whatever we were teaching was outdated before the
 840 course got done, that's why we could never get it out, because our timeline
 841 expanded out the shelf-life. They were broader than the shelf-life than the
 842 content we were working with, so there was not an understanding in
 843 management there on how to adapt timelines to fit shelf-life, This is a time
 844 limit, it has to be done now, so there is that kind of focus. So those are
 845 underlying principles really serve me well through each of those scenarios, so
 846 I carry that with me, even though technologies are different. Now, some of the
 847 technologies I still utilize, I use Excel transforms that I did before, that
 848 technology has carried over. Now I use it to SharePoint, to give me flexibility
 849 and interface that I want to design, but... Uh, so there's some of those things,
 850 but the fundamental principles that do not change regardless. It will work
 851 different, it will feel different, seem different, but it's still ADDIE-ADDIE.
 852 It's always good to have a purpose.

853 Q15 Assuming you are hiring a person as a beginning instructional designer in
 854 Web Based Instruction, what skills are you expecting?

855 A15 I've hired instructional designers. I've done that before. For web-based
 856 training I've hired instructional designers. And now go back to... From an
 857 attitude standpoint, I'm looking for people who are exciting, excited about
 858 learning, about doing new stuff, and there's so much opportunity in this field
 859 to do this stuff. And there has to be that excitement about it. So one of those
 860 things I look for from an attitude standpoint is that excitement about the field.
 861 They put the time in and they're still putting the time in, on learning, that kind
 862 of thing. From a skill set, going back to 2 and 3, I'd love to have all three, but
 863 I'll take 2 or 3. I'll take an instructional designer and artist, I'll take an
 864 instructional designer and who's comfortable with programming, like HTML
 865 and all that stuff. You know, they're familiar with technology. So instructional
 866 design and instructional tech and aesthetics. I would look for 2 or 3 or at least.
 867 If I want them to be in charge of an instructional design process, if that's what
 868 I'm having, I'm gonna put them in front of a client. Okay, if you're talking
 869 about a support person too, instructional designer. I would not take a new
 870 person and make them lead on a project, that's just...it's too risky, very risky,

871 but there is not that tool kit, that cognitive tool kit available for them. They
872 have limited knowledge and practice on how things work, how things take
873 place, so I would not make a new person a lead. As far as support person, then
874 I would want someone who has studied instructional design, from an
875 instructional designer standpoint, I would want someone who's in
876 instructional design. Recognizing that on a team project, you might have a
877 graphic artist, but I would not hire a graphic artist that's an instructional
878 designer. I would hire a graphic artist that's a graphic artist. I would hire them
879 for their expertise, that's what they do. Then hire a web developer as a web
880 developer, I would hire them as them. But as an instructional designer, I
881 would want at least an instructional designer to have a formal program in
882 instructional design. So they know the language, they know the theory base,
883 they have the background, so there is a reference point to which to talk about
884 training, that language skill if you will. For beginner, I would take a 4-year
885 degree, Bachelor's, if that was their area. Again, because they would've had
886 the exposure to that, they would've had the interest, and demonstrated the
887 desire to know more about that area, so I would have that. Or if they got a
888 Master's in it. Whether or not if they would be a lead in instructional design is
889 based on experience. Have they done it before, I would track their record and
890 look at that. Because instructional design doesn't happen in a vacuum from a
891 development standpoint, there is a technical and aesthetic side to this. As I
892 said, I would like to see some demonstration of those two. If we're talking
893 about instructional design for web-based, I would absolutely have to see some
894 kinda of technology or familiarity with technology, they are comfortable with
895 it. If they're fondling with PowerPoint, no. If they can't do that, or they don't
896 know how to format a page in Word, no, you could be alright for developing
897 classroom training, but if you're gonna be a web trainer, then I'm gonna
898 absolutely have to see a technology aspect of that as well. And, there would
899 have to be some demonstrated sensitivity to the aesthetics. Communicating
900 with people in a stereo medium like the web, you need the tremendous
901 sensitivity to the aesthetics to flow, the interaction part of it. So I would be
902 looking for that kind of... If they were bringing portfolio, now moving to a
903 senior type person, I would want to see a portfolio that they've done that
904 demonstrates both the aesthetics, the people side of it, and the technology side
905 of it as well. From beginner standpoint, the thing I have to watch for is we
906 work a lot with competencies/confidence's. We tend to use ourselves as the
907 model. And obviously, a confident person look just like me. Obviously, a
908 graphic artist and a programmer and are getting their doctorate in instructional
909 technologies, that's what you need. No, I don't wanna go that far. I don't
910 wanna go in that direction, yet those things have all been useful for me in
911 tremendous ways to allow me to participate in areas because of those skill
912 sets. But when you do look at the web, the web has a technology component,
913 it has the design component—which I'm talking about the logic structure, how
914 information goes together, how it gets utilized—and the whole analysis piece
915 of it, it has to be there. Ultimately the aesthetics of delivery, because it has to
916 appeal, it has to be used. You go through this ability testing, all of this things

917 will come out. So the web does dry that. And the web has a way of amplifying
 918 that, you know. Because of the distance, the separation of alive human beings
 919 through most of the web stuff, most of the...some of the social media still is
 920 bridging a lot of that. You have to pay extra-special consideration for the
 921 aesthetics, for the interactive piece of it, for those elements, or else you could
 922 go. There's no one there to gain empathy with. You can't, you know, it's
 923 amazing when there's a teacher in front of the room, and the scores are higher.
 924 But if you put a time difference, even with the smile sheets, I forgot in the
 925 studies I've done now, but the evaluations go down the farther the distance is
 926 from the individual. So, you know, in a classroom, there's a relationship
 927 developed. So when you start evaluating, there's some of these things and
 928 with the web, you don't have that opportunity. These kinds of things, like the
 929 aesthetics, become hyper-critical in a web-based application.

930 Q16 Assuming you are hiring a person as an experienced instructional designer in
 931 Web Based Instruction, what skills are you expecting?

932 A16 Still have to be excited. They can't have done it all, because there's so much
 933 more yet to be done, so I'd be looking for that continuing learner, from an
 934 attitude standpoint. I said from a demonstrated skill set, that point, for the
 935 senior person, for the portfolio, the demonstration of those capabilities. I think
 936 kind of all that. No, the experienced one does not need a Ph.D., that's because
 937 I don't have one yet. Hopefully not. See, I said it wasn't just Master's,
 938 Bachelor's. Because there's a certain aspect about being able to language an
 939 instructional design, you have to know what terms are to talk about it, to be
 940 able to put together a design. For us to be able to talk professionally about the
 941 field, there needs to be that education. So from a beginner standpoint, they
 942 need to have that background. Yes, it's book knowledge, but it's a language
 943 now, it's understanding what it is. There will come greater knowledge or
 944 greater understanding of what that is, and again, if there is that attitude of
 945 okay, now I've got the structure, I've got the schema down, how does it all
 946 work, you know, how does it work in this case , what does it look like in that
 947 case, and you can build on that grow. But if you don't have that as the first
 948 criteria, where do you start? They have not shown any interest in the field yet.
 949 Where is the base even? So, either a Master or a bachelor, but some actual
 950 education in the field to know the language, to know the history, and to know
 951 what is about. Then going into experienced one, there has to be a
 952 demonstrated transition from head knowledge into application, demonstrated
 953 application of what's this, how it actually plays out in real life. And again, not
 954 put book knowledge and experience at odds. They are not. They build upon
 955 each other. They work together and one doesn't have superiority over the
 956 other. But there has to be understanding of how they do shed lights on each
 957 other. There needs to be that maturity. They have mutual respect. In order to
 958 lead, the lead is not something that can be mandated. Lead is earned. So from
 959 senior instructional designer, understand how to build those relationships, how
 960 to build mutual respect with the team. That is the first part of leadership. If
 961 you don't have that, you are not even leading because leading is about
 962 influencing. Inheriting of that, it is a high level knowledge about the field,

963 what is going on? Why you do thing? How you do things? There is a proper
 964 way. What the principles are? So, there is the knowledge of field. There is
 965 mutual respect. There is a skill set. Getting into communication is a piece of
 966 it, to be able to communicate and express fluently. Actually I would like to
 967 think I do speak a few languages. One that I speak is HTML, which is another
 968 language, like Excel and Access. I know how to communicate to those
 969 languages. There is technical knowledge that needs to be developed. We
 970 understand of it. Again, so to mature instructional designer, there has to be
 971 that technical development as well because they need the language that we
 972 speak. Instructional design, formal education gives us a language which we
 973 can communicate within community. It is community. Technical language
 974 gives us the way communicating with other people. There is need to
 975 development of expression to be able to communicate even the status of
 976 program. And ultimately, there is influence heard to be able to do that.

977 Q17 Which direction do you see Web Based Instruction is heading to?
 978 A17 We have instructional designer need to understand about what social media is.
 979 Isn't it really different? Do we have series base already that pretty well
 980 support us? Or there is new series base we need to go. We need to understand
 981 more that kind of stuff. Taking into account of social media is not that so the
 982 other goes away. Needs to be continuously thought of as continue online.
 983 Originally Web 1.0 we have public based type of media. You publish web
 984 pages and put out there just like put out your print. Now you got people from
 985 all over who can get to access. We have to use access jump when things went
 986 HTML because you can put things out there and everybody can access to it.
 987 But it primary was a publishing. While we still do that. There are
 988 announcement that things that we put out there. This is the best way to get
 989 information out to publish. We still publish. We still do Web 1.0. That is fine.
 990 You know the Web 2.0, we got into this idea that, while I was publishing, you
 991 can publish too. We are both contributing and we got information out there.
 992 You know the Web 3.0, we get into social media where we have free flowing
 993 communication back and forth. Where is the content? How does the content
 994 exist? We got Wikipedia. We got all these things that content exists out there
 995 never existed anywhere else. So we are all publishing and we are all involved.
 996 Then we have this thing called apps. So we got apps that content is talking to
 997 content, not just people talking to people or people publishing. But now we've
 998 got smart apps, we've got things out there that are communicating with other
 999 apps and are bringing together information in ways that are unique to me. We
 1000 need to understand about what apps are. Actually that would be Web 3.0, Web
 1001 4.0, believe it or not, people are talking about that. But we are getting in with
 1002 the apps, we are getting into this thing called augmented reality. You don't
 1003 realize it but you use it all the time. What you get with augmented reality is
 1004 real-time apps interacting or giving you information. Goggles. You've ever
 1005 heard of Goggles? That is an augmented reality tool. Apps can do that
 1006 monitoring your learning and adopting themselves to you. Apps become
 1007 context-aware. The number of input devices within this thing? It knows how
 1008 you're holding it; it knows if you're shaking it; it knows this way, this way; it

1009 knows where in the world you are; it knows a lot. There is a lot of information
 1010 going into this device that apps have access to. So when you pick it up and
 1011 standing in front of a building, going “What is that building? I think it’s
 1012 important,” and you go into the Goggles and you go, “Oh, the building is this
 1013 and, by the way, so and so lived here and blah blah blah”. You’re standing
 1014 there, real time, and you’ve got reality. And you’ve got it augmented, you’ve
 1015 got it supported. Or you’re outside a restaurant, and you go, “I wonder what
 1016 the menu is,” and it comes up, here’s the restaurant, here’s the menu,
 1017 here’s...and you’ve never gone inside. You go into a museum, and you’ve got
 1018 some apps here on that. Museum modern history, and you’re standing in front
 1019 of a picture. Well, here’s all the information here, here’s how it’s painted, who
 1020 did it. It’s augmented reality. So the space, the classroom, the reality where
 1021 learning takes place, apps start working on that. Now those apps are pretty
 1022 much just single apps. But then when you get apps talking to apps, is when we
 1023 get into a much more powerful network, and you start bringing together
 1024 functionalities, not just information, but tools, performance-support tools and
 1025 elements. Where you’ll see the next iteration go, which is already started?
 1026 Apps that control things outside. You use an app to control the temperature in
 1027 your home while you’re not home. You go on and you look at the babysitter
 1028 camera from your app, you’re not there, you’re here. You initiate the cleaning
 1029 cycle on your robot at home that starts running from your app. So the app is
 1030 no longer confined to the device, the app is actually working in my world. The
 1031 app is driving my car. YYYY products already park themselves. So the next
 1032 iteration—and it’s all blurred now—because these things are happening. You
 1033 can go into Sharper Image, and you can buy a little robot that you can run on
 1034 your phone from your app. Bluetooth, communication. When the app starts
 1035 interacting in my world, that’s taking the yet next step. So from instructional
 1036 design standpoint, all of these start really blurring, and it’s moving so fast, in
 1037 understanding how to develop learning apps. I’ve been in conversations with
 1038 Harvard and these other companies, and they’re trying to understand learning
 1039 apps. What is that? You know, I get in my car, and the car knows I’m there,
 1040 and it syncs up, literally, Ford Sync. And the Bluetooth acknowledges me and,
 1041 you know, I wanna call, I just say, “Call,” and now what was something on a
 1042 machine some place is interacting in my space. So we’ve gone from
 1043 publishing to a collaborative space, to these automated helpers working in that
 1044 collaborative space, to these apps that are now interacting in my space. So,
 1045 from an instructional design web-based training, oh my.

1046 Q18 What do you think an instructional designer should do in order to keep up
 1047 with this direction?

1048 A18 Well, it’s all technology, and that’s where... There is a people side, frankly,
 1049 that never changes. People still—this is me speaking now—at the best I can
 1050 tell, people still learn exactly the same way they did when I started studying.
 1051 People have not changed. We haven’t changed, our capacities haven’t
 1052 changed, cognitive load is cognitive load, it’s still 7 +/- 2. I mean, all that is
 1053 still absolutely true, it’s not going to change very soon, if at all. If anything,
 1054 we tend to be getting worse. Give that aspect of it, there’s a certain side of

1055 instructional technology that is solid. The more we understand about people,
 1056 how they learn, how they interact, that's pretty solid stuff. That is *not* about
 1057 technology. But there is the technology side of it as well, and that's constantly
 1058 changing. So we can be grounded in certain principle-based things, like how
 1059 we do instructional design, those principles are solid, those aren't changing
 1060 just because a new widget came out. But a new widget came out, what do we
 1061 do with that? There is a technology that we need to be aware of, and we have
 1062 to participate in that world and understand it. So jump in. You just gotta
 1063 participate, you gotta be part of it. Ask what's happening. And because of
 1064 our...because we are not passively participating, we are looking at it, we are
 1065 stepping back as instructional designers. We're constantly in it, but we're also
 1066 stepping back and looking at what's going on. So you always have to have
 1067 this strategic point of view. Even in any of the media we use. You know,
 1068 you're in it, but you're also observing. This goes back to more the
 1069 ethnographic type of approach. Training- or design-based development,
 1070 you're in the middle of it, you're happening, but you also step back and you
 1071 are also looking at how are the theories working, how is this happening, how
 1072 can we improve it, what are we gonna do moving forwards. You have this
 1073 dual role, and with this technology, it's very much involved. You're in it,
 1074 you're participating, but you're also observing. At some points, you do have
 1075 to buy the expertise: you don't know how to do it, something is happening,
 1076 somebody is ahead of you, you bring on that expertise, you find it. In some
 1077 cases, you develop yourself, and that's fun too. When you can kinda see an
 1078 opportunity that no one else has done yet, you get excited about it. There's an
 1079 app that hasn't be written yet. And I'm gonna go write it. Or I'm gonna do
 1080 this, I'm gonna make that connection that other people haven't made. And
 1081 that's exciting. Again, if you are participating, if you're in it. But you can't be
 1082 a techno-phobic. You gotta enjoy technology in order to participate in that
 1083 part of the field. Some instructional designers don't care about technology and
 1084 say it's the developer's work. That person is hurting themselves, because he's
 1085 saying, I'm not gonna learn that. How dare an instructional designer say "I'm
 1086 not gonna learn that"? It's like everything is fair game. Everything gives you a
 1087 new insight, a new perspective. Now, do you have time or constraints, I
 1088 understand that, you can't do everything. But to say and draw a line, say "Oh
 1089 no, I'm not gonna learn that, I'm not gonna do that," then what they've done
 1090 is they shut themselves down in that particular area, and they've limited
 1091 themselves. So there has to be that openness to continue to learn, to recognize
 1092 expertise, to respect expertise, but not "Oh well that's not what I do." It's like,
 1093 oh no no no no. I would not have any patience for an instructional designer
 1094 that said that. I wouldn't touch that person, because it's about learning. It's not
 1095 about doing the same old thing. First of all, that person is gonna be caught
 1096 short, because the technology is changing. And just like this area of social
 1097 media, if all you're going to do is the classic course on web-based, you're
 1098 gonna get left. People aren't gonna tolerate it. The audiences aren't gonna
 1099 tolerate it. They've had too much exposure to the web, to the information
 1100 being available, to being able to go out and decide what it is that I wanna learn,

1101 and I wanna learn it. From whom I wanna learn it. This is what they have as
1102 an option. And if you're over here, saying "Oh no, that's technology, and I'm
1103 just gonna stay over here and do my thing" like they have options. And yours
1104 is lesser of an option. Could someone survive and get along doing that? Yeah,
1105 yeah. But to me, that is so fundamentally *not* what an instructional designer is.
1106 An instructional designer is about designing, they are about doing things that
1107 people haven't done before. An instructional designer is fundamentally a
1108 learner. Fundamentally an instructional designer is a learner. And if they ever
1109 stop learning, then they'll stop being effective one, because they're no longer
1110 realizing that this is the unique situation with a unique audience. Yes, it might
1111 be very similar too, but the minute you transpose that pre-assumption on the
1112 new situation, you've missed something. You are no longer effective as you
1113 could be. You have to be present, you have to be in the moment, you have to
1114 be with your audience, working through it. And it's a fascinating role to be in.
1115 I would say a person who's changed multiple jobs is more marketable than
1116 one who's stayed at the same position, absolutely, because they will have
1117 experiences, they will have more in their background of how things to even to
1118 pull from. Not that you would pick something up and just do it the way you
1119 did, but you realize the richness of experience and things that can be
1120 done....so many different ways, different people... The key is to keep...is to
1121 really understand what the fundamental objective is of the intervention, of
1122 what it is that you're trying to do. That's the value point. How you get there is
1123 going to be certain principles that need to be accounted for: principle analysis,
1124 principle design, has to be design—it doesn't just *happen*. It's gotta be
1125 developed. There is certain aspects around that. It's gonna be implemented,
1126 and there's gonna be some way to evaluate this thing. How have those things
1127 been accounted for: it could be an individual like in that project. I could point
1128 to people who represented each of those aspects. Call them a process, no.
1129 They weren't a process; they were people. With those responsibilities, and
1130 those were specific work steams that, for a period of time, were rallied around
1131 a particular goal objective. And in that case, the instructional designer had a
1132 leadership kind of role. And that is focusing, it's bringing together, it's
1133 rallying, it's all those kinds of things to make the outcome the best it can be,
1134 to leverage those skill sets that are in the room. If you can get that in one
1135 location, for instance, you work for an agency, you would have a broad
1136 experience. Like I work for an agency before I came onto MMM, and there I
1137 worked for furniture companies, I worked for pharmaceutical companies, I
1138 worked for manufacturing, I worked for a lot of different kinds of things. I
1139 dealt with sales training, sales certification, we did certification training for
1140 yacht sales, which you would be interested in. We were doing web-based
1141 training for an electronic company, but anyway. But our expertise is what we
1142 did. And we did performance support, understood the full blend that it's the
1143 right tool to right time, what...and the more of the different kinds of things
1144 you are exposed to, the more opportunity and depth you bring to the next
1145 project.

- 1146 Q19 Anything else that was not covered in our conversation but you think is
 1147 important?
- 1148 A19 What haven't I covered...my perspective is that blended perspective, both
 1149 academic and practitioner. At work, I get accused of being academic; at
 1150 school I get accused of being a practitioner. And there's that constant
 1151 challenge of both being true to the academics and true to the practice. And I
 1152 firmly believe they do work together; they are not two ends of something. It's
 1153 not the academics on one side and practitioner on the other. That doesn't do
 1154 anybody any good. And I'm not being facetious at all. I'm being very literal
 1155 that I have been accused of being academic at work and being practitioner at
 1156 school. And I'm a proud practitioner and I am one bit of a scholar. I want both.
 1157 And I want to be able to, in an application environment, to know I've got solid
 1158 principle and practice behind what I'm doing, that I'm not making this up as I
 1159 go—there's history here, there's a lot of good work, a lot of thinking, literally
 1160 to stand on the shoulders of those ones before. So I want that. On the other
 1161 hand, from a scholarly standpoint, there has to be the rigor of practice. To
 1162 make it meaningful. If the knowledge can't be applied, then what good is it?
 1163 There's baggage associated with that. Frankly part of the problem that I had is
 1164 going through the academic side: if it doesn't make sense to me, it doesn't fit
 1165 what I know in practice, it's difficult for me to study, to retain it, to re-quote
 1166 it. It's like, why do I need to quote this person that I will never use? Because it
 1167 doesn't fit, or it's outdated. You know, we know more, we know better now. I
 1168 have a real time with Gardner, because the multiple intelligence was never
 1169 proven out. They were never validated. So people want to talk about
 1170 emotional intelligence and I go, what, what, what? I know what they say and I
 1171 know how to use it, or they wanna talk about different kinds...they wanna talk
 1172 about left brain, right brain. It's like, no, no! It's not. And yet there were lines
 1173 of thought, there was scholarly worth, it was done along those lines at one
 1174 point, but in practice, it's a gap repeated, it became something else misused,
 1175 misapplied. And I want this scholarly piece of it to know where the real
 1176 scholars are, where the real work has been done, and where it's just become
 1177 corporate folklore. Things like brainstorming drive me crazy. "Brainstorming"
 1178 is ill-founded, unsubstantiated in research, and yet it's the first step. "Oh
 1179 we're gonna go and do some brainstorming." And here's the rules: We're
 1180 gonna write everything, and there's no bad answers, it's like... you can even
 1181 go to government websites that propose brainstorming and give you "that's
 1182 how you do brainstorming". And the research does not support it. So there's a
 1183 lot of folklore out there, and that's what drives me to the scholarly side,
 1184 because you want to get through the folklore and all of that kind of stuff that's
 1185 just being perpetuated, and get down to "this is how it really works". And
 1186 ultimately, those are going to mash. How it really works in good scholarliness
 1187 is gonna be the same. It's gonna be the same. And that spot, that weak spot
 1188 that I wanna be in, those both validated, supported, understood, as well as
 1189 very effective in practice. And yet anything less than both would be ludicrous.
 1190 You know, if it's not both, then what are we doing? You know, because
 1191 instructional designer is a practitioner. And yet we study it, academically. So

1192 there is that, that challenge going back and forth. It's exciting still, as you
 1193 know in the beginning, I'm 56, I've been in the business, I've been in the
 1194 industry, I've been doing design work, I was there when performance
 1195 standards were being written, I've actually developed two learning
 1196 management systems, one for TTTT, one for a data-tracking company that
 1197 was doing clinical studies. So I've developed learning management systems,
 1198 they were the standards, they were being formed. I learned my aesthetics
 1199 before computer science. So yeah, looking at all this, it all fits and it does have
 1200 to fit. And it should, like I said. As our learning objects become interactive in
 1201 our own space, like I said, these programmable robots now that are driven off
 1202 of learning devices, cars that now are functioning on their own, and you know,
 1203 these applications, these things that we are working with, we have to
 1204 understand from an instructional design standpoint. Performance support.
 1205 Ultimately a car that parks itself is a performance support tool. A robot
 1206 sweeper that takes care of your house that you control is a performance
 1207 support tool; it's actually doing some of the jobs for you, physically. And it's
 1208 not...those things that I just mentioned are absolutely happening right now. So
 1209 this isn't future kind of stuff. So an instructional designer going forward?
 1210 Technology—better have an understanding of it. I've been members over the
 1211 years in ASTD, ISPI, and...I don't know if I've been a member of AECT yet.
 1212 ASTD and ISPI are more on the practitioner's side, while AECT is academic
 1213 because it's about schools, yeah, it's about teaching in schools. It's a school
 1214 focus as opposed to corporate. ISPI getting into performance—it's more about
 1215 corporate arena. I went to one meeting about a month ago. That was AICT,
 1216 local chapter, I have to do it on my own, purely on my own, my company
 1217 didn't sponsor it. I guess that would make a difference too if my company
 1218 sponsored it. But over the years I've been to things like the Macy learning
 1219 decisions conferences, I've been to those, so I do participate in some in those.
 1220 But as far as a faithful attendee... Well, there is a need for socializing with
 1221 other practitioners, other people. In the case of the last several years I've been
 1222 going to Wayne State, so I've had that other contact. I've had ends. And
 1223 where I work, I'm with other instructional designers as well. I carry that off. I
 1224 talk to her usually several times a week, and we are doing things like need
 1225 assessment, all this stuff. So I... And it's big enough and broad enough that I
 1226 have contact with a lot of different kinds of people who are educated in a
 1227 field. I work with a couple of doctors in instructional technology. So there is
 1228 that professionalism and level independent of some of these organizations. So
 1229 over the last few years, there hasn't been the need, so it's not about neglecting
 1230 that contact. It's about being able to satisfy that kinds of relationships outside
 1231 of the organizations. As I mentioned before, my area of studies specifically is
 1232 in competencies, managing competencies. And specifically creative
 1233 competencies, so somewhat related, so there has been a lot of thought around
 1234 these areas. So when I talk about things like soft skills in the area of self-
 1235 awareness and perception, these are the areas I've been very specifically
 1236 interested in as that supports innovation and creativity and management. The
 1237 topic is creative competency for management from a business standpoint.

1238 What is it? It is *the* most important thing that people keep saying. “Companies
 1239 have to innovate, innovate, innovate.” It’s like, okay, how do you do that?
 1240 Well, we get things like brainstorming. It’s like, no, no, no, no. There is so
 1241 much urban folklore, just, you know, things that get passed along, and it’s
 1242 better than that. From my background, my understanding, I’ve taught art, I’ve
 1243 taught drawing, I’ve taught some of these things. And I understand creativity
 1244 from a more general standpoint. There are schools of thought out there that
 1245 you have to be specialized. And there’s the general school. I come from, you
 1246 know, my background where I’m coming from is that creativity comes from a
 1247 broad knowledge, as opposed to a narrow specific knowledge. And... but to
 1248 be able to work through that, having the opportunity to at least dissertation
 1249 and to explore creativity model that can be caught, supported, understood,
 1250 managed, is where my work is. Who will be your population and subject? Get
 1251 to be determined, it could be XYZ. Within YYYY management. Within
 1252 YYYY, I got global population. So I can span many cultures, many groups,
 1253 and deal with real situations. My original thought was, I might try design-
 1254 based research approach, so I actually became part of a team in explore
 1255 creativity applications and development. With Dr. G’s direction, we might be
 1256 looking instead at developing an assessment instrument assessing creative
 1257 potential. And in that particular case, understanding creativity. What supports
 1258 creativity? That’s where, you know, my particular interest in things like
 1259 bilingual, because it gives you different perspectives to draw on, that a person
 1260 who’s not been exposed to that would not have. This whole structure is ways
 1261 of thinking about things you have that I don’t have. It is... if you can define it,
 1262 you can measure it, you know. And again, if you look at creativity potential,
 1263 not creative production, and making a distinction between the actual
 1264 producing of creativity and having the potential to be creative. Because what
 1265 gets involved between creative potential and creative production is
 1266 opportunity and motivation, and there’s other a lot of wiggly things in there
 1267 that don’t necessarily correlate directly. But those that are creative would have
 1268 these characteristics, these features. And it would be areas, and specific areas
 1269 that I’m looking in, is I break down creative potential, break it down into three
 1270 areas: one is the ability to perceive, the other is in the area of cognition,
 1271 experience or background, and the third area is the area of expression. And a
 1272 lot of the creativity studies focus on maybe the first two to be able to... they
 1273 say a creative person is someone who sees things differently. So they’re
 1274 touching on some of that, you know, they have to be able to see first, but there
 1275 also has to be a background, there has to be experience, there has to be things
 1276 to draw upon. You can’t connect dots when all you’ve got is one dot. You can
 1277 have something to work with in order to see new connections, new
 1278 possibilities. And the one that nobody talks about is the area of expression.
 1279 Absolutely inherent to creativity is the ability to express. And when I look at
 1280 expression, if I wanna measure creative potential, I look at how many
 1281 languages do they speak, do they know music, can they draw, how can they
 1282 express themselves. The more ways that you can express yourself, the more
 1283 ways you have of seeing things and ways of organizing things. So expression

1284 absolutely affects the ability to perceive and to understand, just like the ability
 1285 to see affects how you can express. If you can't see a sunset, you can't express
 1286 it. I mean, you know, if you can't hear a melody, you can't write a song. You
 1287 know, it's... and if you don't know music theory, you can't write a score. You
 1288 know, if you don't know how color works, if you don't understand the
 1289 principles of perspective, you know, and if you...so there's a cognitive aspect,
 1290 there is a knowledge aspect of creativity, there is a perception aspect, and
 1291 there is an expressive aspect of it. Then when you look at all three of these, I
 1292 can measure things about those and come up with a potential. This person has
 1293 potential of being highly creative, you know. There are well-established, they
 1294 are, you know, they can sing, whatever. This person has a high potential to
 1295 creativity. And if I see that they do this and this but they don't do that, guess
 1296 what? You know, if you went to school, maybe, you are able to see uniquely,
 1297 you are able to see things that people aren't seeing, and you are really excited
 1298 about it, but you are drawing lacks, the discipline, lacks of skills. You can
 1299 teach, you can explain to them, you can... and this is what I did in teaching art
 1300 and teaching drawing. I gave them a cognitive tool kit to draw from. Here's
 1301 how you shade, you know, you can hatch, you can pointillism, smudge, you
 1302 can watercolor...lots of different tools here. Now with that tool kit, I can see it,
 1303 now I've got things, now I can express myself and I've become more skillful.
 1304 So... Creativity can be trained. That is my premise, and I'm not the only one
 1305 to hold that position. There are people that do too, but there are some people
 1306 that think, "Well it's a gift." And here's the explanation, and I'll just make a
 1307 general statement. Everybody can run. Some people can run faster. Virtually
 1308 everybody can be taught to run faster. Some people just...they are structured,
 1309 their physical makeup, they've got more muscle and whatever, they can run
 1310 faster. And this person will never run as fast as the person does. But this
 1311 person can run faster. And that point, you need physical ability as well. And
 1312 frankly for an Einstein, there needs to be the physical capability, the mental
 1313 capacity, but to tell someone, you know, "Well, you are not... you don't have
 1314 the gift", it's like, what? No, no. Everybody can be healthy, you can exercise,
 1315 you can do better than you are doing, and from an organizational standpoint,
 1316 you want everybody performing at the next level, because they are seeing
 1317 things that other people aren't seeing. They are exposed to customers that
 1318 other people don't see. You want them thinking creatively. You want them
 1319 thinking in terms of how can I contribute, how can I add, how can I express
 1320 myself, because when you get the whole team engaged, now that's powerful.
 1321 So that's the area. It's not about making everybody a world-class sprinter, but
 1322 we all can run faster than the next guy. You know, we can do better than we
 1323 are doing and have that optimism and approach. Then you take a look at
 1324 creative production, you know, getting "Okay, we have all this". And if I
 1325 don't understand what it takes to support creativity, if all I'm gonna do is look
 1326 at motivation, and I haven't given them the tools, we haven't gotten into the
 1327 training, we haven't set them up to be creative, you say ok we are just gonna
 1328 come in here and do a creativity workshop, and you are gonna be creative. It's
 1329 like, *r...right*. Okay, right, sure. Right. And that happens. That happens all the

1330 time, with “oh, it’s just motivation.” You know, if we make an award system,
1331 you know, for new ideas, and we’ll give you, you know, five hundred bucks
1332 for a new idea we use, you know. Or they are working on the motivation. But
1333 they’ve done absolutely nothing to really enhance or develop creativity, or
1334 even understand what it is. They are treating it as just some kind of “Well, you
1335 are not motivated, which is why you are not creative.” Many many many
1336 many factors in it. So I’m always saying that the way it relays, because an
1337 instructional designer has to be creative. They have to be able to see, perceive,
1338 understand themselves. They have to bring with them a knowledge set to build
1339 upon, and they’ve got to ultimately be able to express that knowledge in ways
1340 that are accomplished, that people respect, that people appreciate. So it’s...
1341 I’ve been a creative director in two agencies. That’s the other part—I’ve been
1342 a creative director. I’ve had to do creativity. And people buy it, people pay for
1343 my creativity. So yeah. I’ve had that role. And instructional design. And now
1344 Dr. T has started seeing, you know, she’s looking at the work of Nigel Cross
1345 and design-based thinking. And it’s like, yeah. That’s exactly right.
1346 Instructional designers *are* designers. We’re creative.

1

Transcription of Interview 012

- 2 Q1 Good Afternoon, thanks for taking time with me. Can you tell me your current
3 job title?
- 4 A1 Assistant professor
- 5 Q2 How long have you been working in the current position?
- 6 A2 1 and half years
- 7 Q3 What's your age range: 25-35, 36-45, 46-55, and 56 above?
- 8 A3 36-45
- 9 Q4 Would you say you are currently actively involved in instructional design?
- 10 A4 Yes
- 11 Q5 Are there any other positions have you held before, that were related with
12 instructional design?
- 13 A5 Yes, I was a vice president at a company from March 2002 until July 2010,
14 and I still consult with that company. And prior to that, I was an independent
15 sales representative where I had to do on-site training and I was designing
16 those training experiences, it was from 1998 to 2002. And then from 1994-
17 1998, I was internal sales employee where I assisted sales representatives for
18 their sales training.
- 19 Q6 How many years accumulatively do you estimate you have worked in
20 design/development for WBI?
- 21 A6 For Web based, it is about ten years, from 2002 till this year.
- 22 Q7 In those WBI projects, how many years accumulatively do you estimate have
23 served as a lead instruction designer/developer?
- 24 A7 Ten
- 25 Q8a What's the major of your bachelor's degree?
- 26 A8a Communications in Bachelor
- 27 Q8b Did you have postgraduate education: Master's, or Ph.D.?
- 28 A8b I had a Master's of Arts in Performance Improvement and Instructional
29 Design from U of M Dearborn, and a Ph.D. in Instructional Design from
30 Wayne State.
- 31 Q8c Have you had any other training on instructional design?
- 32 A8c Yeah, it was actually part of the master's program. It was a certificate
33 program from ASTD in human performance improvement, and it was back in
34 November 2003.
- 35 Q9 What's the business nature of your current organization: business/industry,
36 education, government/military, health care, independent, other?
- 37 A9 Education
- 38 Q10 What's the estimated size of the organization you are working for?
- 39 A10 I am going to have to look that up. Let me look here. I have over 19,000
40 students, but that is not what you are looking for. There is a site that has this
41 information. Yeah, I have seen this before, too. I just do not remember the
42 name of the site. It has all this information about public universities.
- 43 Q11 Can you tell me a Web Based Instruction project you are very proud of or got
44 highly recognized?

- 45 A11 It was a training program that educated internal employees at a major
 46 automotive manufacturer about one of the departments that existed within the
 47 organization that most people did not know about. The sponsor of the project
 48 was this specific department within the automaker who wanted the other
 49 departments to know what they did, and what the correct processes are to go
 50 about asking for their assistance in day-to-day activities. They hired my
 51 company as an external vender to do the work, but actually it was all
 52 internally based. They wanted to communicate what their department did to
 53 other departments within the company. It was a big company and there was a
 54 lot of confusion about what they actually did.
- 55 Q11a How many team members in the project?
 56 A11a I would say five, if you include some of the people who did some part-time
 57 work. We had a project manager. We had two developers. I also did some
 58 development, but I was primarily responsible for instructional design, as well
 59 as being the main client contact. There were two primary SMEs and there
 60 were probably, I would say, three more specific SMEs who played smaller
 61 roles.
- 62 Q11b How long did it last?
 63 A11b That's a good question. I would say it was probably three months. I took this
 64 project because it was a really interesting one. It was really challenging and
 65 unique. It was probably eight years ago. There were probably four modules,
 66 but it was designed so that there were different paths depending on what
 67 department the learner was in. At the beginning, they would select their
 68 department and the path would be customized for the information that they
 69 needed to know.
- 70 Q11c What was the project about, was it about how to complete a step, process, use
 71 systems, or how to perform physical jobs, or change attitude/value?
 72 A11c It was the last and third. It was a process, but it was also about changing
 73 attitude and value. The primary organizational problem that existed was that
 74 these departments would come to this one department with requests that were
 75 not realistic, and it was because they did not understand really what that
 76 department did and the lead times necessary to do what they needed to do.
 77 They needed to change the perspective and the attitude of what other people
 78 came to them thinking, so that was a big part of it. But then, there was a lot of
 79 process content that had to do with how this department actually does their
 80 work so that these people could learn it, and then also what were the right
 81 steps to follow in order to make these requests in a realistic fashion so that this
 82 department could respond effectively. So that's why I think it's those two
 83 options.
- 84 Q11di Describe the project in a very high level (the process by stages)
 85 A11di As from the project perspective of the stages, we basically start off with an
 86 information collecting stage, which is not specifically considered a needs
 87 analysis. It would be more of a content analysis. The unique thing about this
 88 project was that a large part of the design work had already been completed,
 89 but not all of it. The company that had done that work had gone out of
 90 business prior to the development stage starting. Overall, on the whole project

91 – if you take a step back and look at the whole project from the client’s
 92 perspective, they were really in the transition from the design to development
 93 phase, if you look at just ADDIE. Whereas from our perspective coming into
 94 it, we still needed to do our front end work to understand the context of what
 95 was happening, who the learners were, so really kind of doing a short and
 96 quick needs assessment on our end so that we understood all this stuff. But
 97 then when we engaged with the client, they were already at that starting of the
 98 development phase, so that is really where it kicked in. We followed the five
 99 phases, really. We had analysis design development and then implementation.
 100 Q11dii Describe the project in as much low level (steps, tasks) as possible
 101 A11dii Well, the first thing that happened was we had an initial vendor meeting with
 102 the client. This was before actually getting the work, because we were not an
 103 approved vendor with the client at that stage. With a lot of these larger
 104 organizations they go through a process with whoever manages the training
 105 programs and their purchasing department to that vendor before giving them
 106 projects. We needed to meet with them to set all that up. So there was a
 107 formal process which would be setting that up, putting together the
 108 paperwork, answering specific financial questions and that kind of thing.
 109 There is also an informal process which is really more of a sit-down with the
 110 training managers at the company who oversee us and the job that we are
 111 doing, and they need to just be ensured that we can actually accomplish what
 112 we are seeing and what we are going to accomplish. So that was probably the
 113 very first meeting, was that in process to become an approved vendor. After
 114 that happened, we had a project kickoff meeting. We sat down with just the
 115 internal training team at this company. That did not include the SMEs. It
 116 only included the people who oversaw the design and development and
 117 implementation of the training program itself. They wanted to have us to be
 118 on the same page with them and understand the history of project, to
 119 understand the timeline of the project, to introduce us and explain to us who
 120 the SMEs were, though they were not present, but saying here is who these
 121 people are, explaining to us how the communication process would work. So
 122 what you asked before, was it acceptable to go directly to a SME with a
 123 question, or should we be going through the training department. They kind
 124 of level set that. It was actually okay to go directly to the SMEs. The way
 125 that it was pretty much defined in the kickoff meeting was that for all
 126 technical issues and technical questions and that side of the equation, we
 127 would be dealing directly with the training people. There was one training
 128 manager in particular who you would deal with. From a content perspective,
 129 you would be dealing with the SMEs. Of the five, there was one who was our
 130 primary contact, but there were four others that would be contacted, as well.
 131 As a predecessor to all this, the SMEs had been involved with the design
 132 phase of this project, with the pre-existing company. They already had been
 133 involved and had worked on putting together the content and all that stuff.
 134 They were familiar with it. So when we came on as a new company, we did
 135 not have any of this previous knowledge or experience. That was a big
 136 challenge, determining exactly where we were at, what is the environment,

137 what is the context. That was a challenge in working with the SMEs because
138 sometimes we would ask questions that they have already had and they had
139 already gone over. So they were sometimes frustrated. They would not
140 understand why we were asking these questions, when we had no idea what
141 the answers were because we were not the previous company. So that was an
142 interesting aspect of it. Then we would have, in terms of project management
143 and communication, we would have weekly reports that we would submit to
144 our training managers. As vendors, we would be required – I think it was on a
145 Friday – we would report on basically a one-page word document sheet
146 where we would report on the work we had done the week prior, what we
147 were going to do the week following, and identify any issues and how we
148 were going to go about solving those issues. It was a really clean and neat
149 project report that we would submit weekly. Then we would go into
150 development and we would develop modules. We would post the modules for
151 review of the SMEs, and they had an alpha review process, a beta review
152 process, and a launch. Actually prior to the launch, it was alpha, there was
153 beta and part of the beta was a pilot where we actually had twenty to thirty
154 internal employees who were the audience. They went into a specific pilot
155 room and they took the course. So this was to ensure that the course ran
156 correctly, that there were not any major technical issues and that kind of thing.
157 So we did that prior to the course actually launching. Those were major
158 stages of the project, as well. There is kind of a formal way to do the
159 communication and coordination within the team and then an informal way to
160 do it. The formal way would be internally, just our team as a vendor. We
161 would have status meetings on Friday mornings. Those would be basically
162 reviewing where we were at, what our big needs were, and kind of a report to
163 the owner of the company and to the project managers, just kind of big picture
164 stuff on where we were and what was going on. So that was the formal way.
165 Quite honestly, that was maybe five percent of it. The other ninety-five
166 percent was an informal way where we would be all in one spot. So there
167 were no people who were offsite, we were all onsite. Throughout the course
168 of the day, we would just be communicating on where we were at, where our
169 needs were. I would have certain people working on certain aspects of the
170 project and certain people doing other things on the project, and we could
171 review the development of it real time from our server so that we could look
172 and see where things were and where they were going. During that
173 development phase, we actually had four people who were actively involved
174 with developing. I would assign the work and coordination and track the
175 progress. I would have a certain person do a certain thing or a certain group
176 of things on different pages, or maybe try to figure out how to do a certain
177 action that we could then incorporate on other pages. Then, we could review
178 throughout the day where people were, or we could simply ask, “Have you got
179 this page done yet? Are you on this yet?” So it was very informal. But since
180 we were all onsite in different offices it can be very immediate and very real
181 time to know where people were at, as opposed to, relying on an email or
182 something like that where you have to write the email, you have to send the

- 183 email, and then you have to wait for some response about where somebody
 184 was at. It was very much real time which I think really, really helps in
 185 keeping a project that is on a short timeline moving. We did course evaluation
 186 before it was launched. That was that beta stage where we had the pilot. In
 187 YYY company, we did a level I, just to get their gut level reactions to the
 188 course overall. We also did a level II in terms of their knowledge assessment
 189 based on the course itself. So there was a post test built into the actual web
 190 course that was also directly aligned to the pass that they took. So depending
 191 on what department they were in it would have a specific pass, and we had to
 192 make sure that the test reflected the pass that they took, too. So we had the
 193 results from the post test as well as results from the pilot, in terms of the level
 194 one. In other words when we ran the pilot with those twenty to thirty
 195 employees, we had the results from the level one evaluation and we also had
 196 results from the level two evaluation, testing their immediate knowledge on
 197 whether they had the content down or not. So those were the ways that we did
 198 the evaluation. Once it was launched, as vendors we were no longer involved
 199 in any sort of evaluation. The training arm of the company took over at that
 200 point. As I recall, there were no major changes necessary in response to the
 201 evaluation information. If there were, we would have implemented changes.
 202 But the passing rates of the post tests were where they should be. The
 203 feedback from the level one evaluation was all positive, or at least to the
 204 extent where revisions were made where required to be made. If there were,
 205 we would have made them. I don't think they were required. I am also 100
 206 percent certain of that. It was just awhile ago, but I am pretty darn sure of
 207 that. If there was anything that was required to be made, we would have done
 208 it. At that stage, I think we were pretty dialed in.
- 209 Q11diii What event/communication marked the beginning of the project?
 210 A11diii (Answered in A11dii)
- 211 Q11div What event/communication indicated the completion of the project?
 212 A11div This has to do with the maturity of the organization, the training organization,
 213 us – I don't think we had a formal post mortal meeting at the conclusion. We
 214 have done that with other projects. With this one, we did not. It was launched
 215 and it was live. What we did from a business perspective was schedule a
 216 meeting that allowed us to talk with them about potential future work. But it
 217 was not a formal post mortal in terms of the project itself. Because once it
 218 was launched, the company itself took ownership of everything. They
 219 basically had taken everything over by themselves. We were kind of out of
 220 the picture at that point. Because they already had their system setup, what we
 221 had to do was we had to come in as vendors and basically learn how their
 222 WBI worked and then utilize their structure. So they were not getting a
 223 "customized course" from us. We were learning their system and then
 224 designing it to fit their system.
- 225 Q11dv What was your role in the project?
 226 A11dv I was the lead instructional designer. What that meant was I reviewed all of
 227 the existing instructional design documentation. So there were designed
 228 documents. I believe the design document was setup in a Word format. There

229 was also a proof of concept that had been structured in using – how was that
 230 course launched? Oh, it was in SABA. It was in a specific framework. We
 231 used SABA in order to build it with JavaScript. We had basically a starting
 232 template from the client and we used that template as a starting point to
 233 develop all the modules. My job was to basically understand the template,
 234 understand how the design document worked or the storyboards worked, and
 235 ensure that we were translating the storyboard correctly into the SABA
 236 template. So that is from the design perspective. Where I saw opportunities
 237 to improve the design or change things to make them a little bit more effective
 238 or efficient I would do that, where a lot of the work had to be communicating
 239 with the development team exactly what we were trying to do or how to go
 240 about it. So that is the design aspect. From a development aspect I was also
 241 developing the course with the developers. I would go through pages as my
 242 time allowed and work on certain things as that allowed. Then thirdly, I was
 243 the main client contact with the SMEs. I would go onsite and talk with them.
 244 I would also be the main contact with the training client, so I would go onsite
 245 and talk with him and also report to him on that weekly basis. Basically, I
 246 also played a role of a project manager at the project level as opposed to a
 247 higher level program manager, who we had.

248 Q11dvi What software and services were used?

249 A11dvi It was a SABA system. We developed – what did we use for development? I
 250 think we used Dreamweaver way back then. That was the only time we ever
 251 used Dreamweaver as a development tool. We used Dreamweaver with
 252 JavaScript to develop the course, and then it was loaded into a SABA system.
 253 There was Adobe Photoshop. I do not think we used any Flash for that
 254 project. I do not remember if we did. There was a little Flash piece, but we
 255 did not do it. There was Flash, you could say Flash. Flash was in there. No
 256 audio other than Microsoft Word and Excel. Those would be more from an
 257 administration perspective.

258 Q11dvii What hardware and devices were used?

259 A11dvii I do not think so. We did not use any video cameras or anything like that for
 260 this. This was all just web based. The content was all text based. We did not
 261 hire any outside person.

262 Q11e What were the outstanding features of this project?

263 A11e To me it is less about the actual training course itself and more about the
 264 relationship. Because of that situation being very challenging in regards to us
 265 stepping in midway on a project and filling the shoes of the previous vendor,
 266 it was very challenging. Having to navigate that and learn all the back history
 267 as quickly as possible, understand the storyboards, and get up to speed on the
 268 technology on a very short period of time was challenging. But we did it, so
 269 that was good. The training arm of the client was very happy with us because
 270 of that and also because of the way that we interacted with the SMEs. In other
 271 words, they basically had a problem. They had hired another vendor who did
 272 half the work and then went away. We came in as a solution to their problem,
 273 not from a training perspective or an instructional perspective, but from a
 274 business perspective. We did a very good job with that. To me the more

275 rewarding part of the project was that we did that in a business way, which is
 276 more than just like the technical aspects of the instructional design and
 277 development, but more of a relational kind of a thing. That to me was the
 278 biggest win from that project. It's the first project we ever did that had a
 279 SABA system – and the last as well. So we had to learn to integrate it with
 280 that. It also used AICC as opposed to SCORM which is a standard that is now
 281 completely outdated. We had to kind of learn to integrate the course using
 282 those standards and that language. Technically it was challenging, but we
 283 navigated that and we learned it and we did it well, so that was good, too. I
 284 would say it was probably those two things. From what I heard about the first
 285 vendor, they actually had a very good reputation. Their work was very good
 286 and professional. I do not really recall the specifics of what had happened, but
 287 they basically were a concession of consultants and for one reason or another
 288 they went out of business or they no longer worked together, or something
 289 like that. Basically, they just had to walk away midway through a project. So
 290 think about yourself. If you were on part of that training team with this
 291 company that hired that vendor, you kind of have egg on your face with your
 292 coworkers who wanted this course done, and you had to turn around and say,
 293 “Well, that company that we hired is no longer around,” which is a big part of
 294 that whole vending process when you get to be a vendor. They want to make
 295 sure you are going to be around so that kind of thing does not happen. So that
 296 is why, to me, that was probably the biggest win was being able to help them
 297 out of that predicament by stepping into a challenging situation and doing a
 298 good job. That's how they hire us. And from their perspective, they were
 299 already out of the timeline. The project had its own timeline. We were just
 300 stepping to help get the project done, but the timeline was the timeline. So we
 301 were not part of the agreement process on what the timeline would be. But in
 302 that first meeting, if you recall, the first meeting I was telling you about, we
 303 were ass point blank, “This is our timeline, can you make it?” Before they
 304 hired us they wanted to make sure that we could buy into this timeline. As for
 305 the second challenge, you go to the Internet and you download whatever
 306 software you need. I did not look at that side of the equation as much. I was
 307 doing more of the page building and the instructional design and popup
 308 windows and that kind of stuff. We had our development manager who was
 309 looking at the technical aspects, like the AICC stuff and then the SABA stuff.
 310 We don't need to coordinate their learning code, only in as much as saying,
 311 “Here is the challenge. We need to know this, this, and this in order to make
 312 this work.” So your number one priority is to figure out what we need to do in
 313 order to make it work. It would be less formal in a smaller company like we
 314 were. It is less formal and more informal, just to say, “We got to get this done
 315 now, so it should be your priority,” rather than saying, “Okay, by next
 316 Tuesday we need to be here,” which is a benefit of being in a small company.

317 Q11f Did it occur to you that you wish to have done the project differently?
 318 A11f Here is the thing, and this is one of my great learning experiences from it, the
 319 only thing was it is really important to understand the needs of your clients
 320 and the perspectives of your clients. One of the things that happened when we

321 were in the alpha stage, which is the very first – like we are showing the
 322 clients and the SMEs the first pass of the actual live course – it had not been
 323 launched and it had not been piloted, they could see it – I had been working
 324 really hard. I had just finished an 82-hour work in order to get this alpha
 325 review ready. I was taking the day off. It was a Tuesday, so I had worked all
 326 weekend, I took the day off, and I was riding a bike and my cell phone rang.
 327 It was the main SME. I knew that the course was launched and that we had
 328 reviewed it until we were blue in the face and it was fine, so I did not know
 329 why he was calling. I did not know if it was a good thing, a bad thing, or
 330 what. I answered the phone and I talked to him. He said, “Well, I just need to
 331 say that I am really, really disappointed in this one part of the course. It is not
 332 at all what I thought it was going to be.” I said, “Okay, let’s review it. I am
 333 actually not at the office right now. Let me get back in and I will give you a
 334 call.” What ended up happening was I had taken what the storyboards had
 335 said and build them into a course, so it was kind of a static situation where a
 336 page was, let’s just say, a colored box with information on it. The next page
 337 was another colored box with information on it. Then the next page was
 338 another colored box with information on it, because that is specifically what
 339 the storyboard had said. When I talked with him about it and we went through
 340 it together he said, “No, this was supposed to be where you click here and this
 341 window comes up and they can click through this whole thing on one page.”
 342 See the difference? So what had happened was with the previous company
 343 they had explained to him that that is how this was going to be. But in terms
 344 of what I could see in my information, I had no clue. From his perspective, I
 345 am just the developer, designer training guy, so I should know everything
 346 about what this was supposed to do. So he is not taking into consideration
 347 that I was not even around when they had designed this or what the
 348 conversation was. But that does not matter, because from his perspective that
 349 was my role. So I did not fully understand what his expectations were. So for
 350 me, one of my big takeaways from the project – and we fixed that and made it
 351 right. And it was not even that hard to make it the way he was talking about,
 352 but one of my big takeaways from the big project was in terms of the
 353 relationship as the consultant to the client is to put my best foot forward and
 354 put as much energy as possible into truly trying to understand what the
 355 expectations of my clients are and what their perspective is on the outcomes
 356 on what they want to see. So in this situation, I could honestly say that I was
 357 blameless. However, that did not matter because it is all about perspective.
 358 Now, I had to turn around really quickly and work a lot more again and get it
 359 the way he wanted so that they were happy with what it was. I had shared that
 360 whole scenario with the training client, the more technical client, to say, “Hey,
 361 this is what is going on.” He totally understood because he could see the way
 362 that it was, and he said, “Okay, well, great. Good job for making it right.” So
 363 that was a great takeaway just to focus as much as possible on the clients’
 364 expectations.

365 Q11g What were the solution(s) to the challenge(s)?

366 A11g (Answered above)

- 367 Q12a What specific knowledge, concepts, and ideas that helped you?
 368 A12a I would say that just generally the ADDIE module gave us the foundation that
 369 we could follow. I think the most valuable aspect of that is it just clearly
 370 gives you a mental schema of where you are at and what you need to do in
 371 each stage of the project. So I would say we used that. From an instructional
 372 design perspective, I mean there are some rules of thumb. Again, we did not
 373 do the majority of the instructional design in the course, but not trying to have
 374 too much on one page, minimizing the interactivity so the interactivity is only
 375 there where interactivity itself lends to learning, having enough white space
 376 on the page, that kind of thing, basic message design principals. I guess that
 377 would probably be it.
- 378 Q12b What soft skills did you use?
 379 A12b This is really where right now the focus of my research is on, this idea of what
 380 you are calling soft skills. That is what I would call the relational side or
 381 partnering skills with the client. I would say the number one thing is being
 382 able to have empathy with the client. It is not sympathy and it is not
 383 compassion, it is empathy which is technically meaning being able to put
 384 yourself into your client's perspective, so that you can really understand what
 385 your client's drivers are, what your client's needs are, what your client's
 386 expectations are. Once you can do that, you are in a better position to be able
 387 to meet or exceed those expectations, and to understand what those needs are.
 388 So really it is about a mindset of being able to fully understand your client's
 389 position on things. That is the big one. If you can do that, you will develop
 390 trust with your client, your client will have more faith that you are going to get
 391 done what you promised to get done. That is the biggest one to me. To me,
 392 that is the big one in terms of soft skills, is being able to empathize with your
 393 client's perspectives. Of course, in any communications you have to be
 394 professional. You have to carry yourself well. You have to dress
 395 appropriately to the standards of the organization. In other words if you want
 396 to wear a suit and tie, if you are a man, and the man of the organization does
 397 not wear suit and ties it is best not to wear a suit and tie. Because you are not
 398 melding with their culture, you are coming in as something different, either
 399 above it or just outside of it. But you really want to be as much of part of the
 400 team as possible. The way you dress is a big part of that. The way that you
 401 speak, the way that you write emails, professional communications is a huge
 402 and a very important part of all of this, especially when you are coming in as
 403 an external consultant. So there is that. I don't know, is there anything else? I
 404 think the one example of the conflict resolving that I gave you – well, here are
 405 two. One is that situation about the client's expectations about what that one
 406 process was supposed to be, in terms of the final project was different from
 407 what we had delivered in the first review, because we did not understand it
 408 correctly. So that was a big one. That had to do with client expectations.
 409 There was a second one, though, that had to do with when we were trying to
 410 look for more work after we were done – just to say, "Hey, if you have any
 411 other projects, we are available and we would be thrilled to keep working with
 412 you." Their concern was that we were too small and that we did not have the

413 resources to do the scale and scope of projects that they really required. So
 414 that became a challenge from a business perspective because now I had to try
 415 to encourage them that we were capable of doing what you needed us to do,
 416 and we scale up our company as needed based on the project. I would say
 417 those two were the obstacles to overcome.

418 Q12c What hard skills did you use?

419 A12c I did a lot of copy editing. I did a lot of copy writing. In fact now that you
 420 mention it, I'm remembering it. That was a large part of my instructional
 421 design was. It was going through and making the text more conversational and
 422 less formal, which was better for the course overall. So that was a large part
 423 of what I did. I also did programming. I worked in Dreamweaver. I used
 424 JavaScript, so I coded JavaScript onto pages where that was required.
 425 Animation was kind of done in JavaScript. Again, this was eight years ago,
 426 but you can do that kind of stuff in JavaScript as opposed to just Flash. We
 427 had Flash. In this course, we just did not use a lot of Flash. Video and audio
 428 were pre-existing. It was really just creating links to make the video elements
 429 work, or the audio elements work. We have a studio there and I have done all
 430 that stuff, but on this project, no. FTP, so posting stuff, uploading content for
 431 review into their system. That might be all I can think of.

432 Q12d What attitude did you realize that was helpful for the success of this project?

433 A12d I would say the biggest one was commitment, commitment to meeting
 434 expectations, commitment to the timeline. Like I said, I worked an 82-hour
 435 week in there. There were other people working 60- or 70-hour weeks. If we
 436 had not done that, we would not have gotten it done. We would have hit the
 437 timelines and we would not have met the expectations. So that is the biggest
 438 one, the commitment to the project and the commitment to the client in order
 439 to really meet the expectations. That was a big one. I think another one for
 440 me personally, and this cuts across all the projects that I work on. I really
 441 need to focus on how the work that I am doing is going to improve
 442 performance at a company or improve people's lives, maybe by not this
 443 course but maybe in other courses – there are a lot of them that this is true , by
 444 people understanding the content of the course and getting better at their job.
 445 They are setting themselves up to excel so they can have potentially raises,
 446 they can have promotions, that kind of thing. But if you as an instructional
 447 designer or as a developer or just as an performance improvement person you
 448 can make these connections in the projects that you do, then it helps in terms
 449 of your internal motivation to work hard on the projects and do what it takes
 450 to get them done in a quality fashion and an effective fashion. I would say that
 451 is maybe the big one. It is not seeing the forest through the trees. Because
 452 really as a technician, which is true, an instructional design technician. At that
 453 technician level you are so involved with the detail of the thing that is in front
 454 of you at the moment, it is hard to take a step back and look at the whole
 455 forest and see maybe how this is going to re-enforce some goal that makes the
 456 company better or gives an employee the opportunity to rise in their
 457 workplace, that kind of thing. Yeah, I agree. It is hard to see that.

- 458 Q13 Which year was the project? What do you wish to have known that you didn't
459 know back then?
- 460 A13 I think it was 2003. I wish I knew more about the relationship with clients. I
461 wish I knew more about that, and the overall understanding. This is what I
462 have really looked at in the last three or four years. Now I am pretty
463 knowledgeable about it. Back then it was really more off the cuff, and just
464 thinking that if I worked hard and if they like me or whatever then that was
465 enough. But understanding that there really are some core things that you can
466 do within the relationship to make that client-consultant relationship stronger,
467 which will allow you to be more effective and allow maybe better apt to get
468 that long-term commitment which is if you recall was one of the challenges
469 after we were done. They did not see the opportunity for a long-term
470 commitment because they saw us as limited in our size to be able to deal with
471 the stuff they needed. So that would probably be the big one. I do not think
472 there were any technical skills or technical knowledge that would have made
473 it all better. And that is my bias, of course, because that is what I really look
474 at. I think it would be those relational things, how to most positively affect
475 the relationship.
- 476 Q14 What are the other knowledge, skills or attitudes which were not used in the
477 above project but you used in other WBI projects you led?
- 478 A14 I have done a lot of projects. That first project was much more of an
479 instructional project. Many of the projects I have done are more performance
480 projects where it is more important to understand how the organization works
481 as a system and the different levels within that system and the different roles
482 that people play within that system. So that type of performance improvement
483 knowledge has been very important in order to work affectively in those
484 different kinds of situations. Technically, looking at how to – I mean there are
485 so many things, for example how to write learning objectives within a course
486 that align to the overarching goals that the course was supposed to help meet.
487 There is writing good test questions. That is important. There are other
488 programs that you kind of alluded to, but yeah, there are all sorts of video
489 editing and video recording programs from a technical point of view that you
490 can use. There is Vegas. There is Camtasia. There is Adobe. I do not use
491 Captivate, but there is like Lectora which I use. There is Flash, I think I have
492 mentioned. There is Photoshop which is key for any kind of image
493 manipulation. There is Sound booth for audio editing. There are tons and
494 tons of all these different programs that allow you do audio visual stuff.
495 There are also facilitation skills and delivery skills. I have done a lot of
496 voiceover narrations, as well, for training. So having those kinds of skills,
497 how to speak well, how to carry your voice well, but how to naturally and at
498 ease. Those kinds of things are important. And then if you are actually going
499 to instruct, there is a whole bevy of skills needed to be an affective instructor
500 and affective facilitator. You need to understand the audience, just like
501 constructional design but also face to face. How do you have credibility in the
502 eyes of an audience, because if you do not have credibility you are going to be
503 in big trouble. How do you carry yourself, how do you use hand gestures,

504 how do you control the pace of your speaking. There is a whole other skill set
 505 within that. To me, it just comes back to some basic things like being
 506 professional, professionalism is a big part of it. That is how you carry
 507 yourself, so this is attitude. Professionalism in the way that you act, the way
 508 that you dress, the way that you speak, the way that you write emails, that is a
 509 key component. Another thing with attitude –and I guess this is soft skills and
 510 ties back to before – but listening skills are absolutely vital. The one thing
 511 that you can completely turn off a client is not listening to what they are
 512 saying. These are skills that are developed. You have to work on becoming
 513 good at these things. They are not generally inherently turned on with you
 514 right out of the gates. You need to work on your concentration. You cannot
 515 listen to somebody well if you cannot concentrate well. Then there are
 516 techniques you can use with that. If you heard somebody say something, you
 517 can repeat, “So what I have heard you say is...” boom, boom, boom. By
 518 saying that you are letting your client know that you are actually listening to
 519 them and you are sending a signal that you are trying to internalize what they
 520 are saying. You are really just showing them that you are on the same page
 521 and you are trying. Those are important, too. That is a huge question. I could
 522 go in a million different directions.

523 Q15 Assuming you are hiring a person as a beginning instructional designer in
 524 Web Based Instruction, what skills are you expecting?

525 A15 Well first and foremost, they would have to have sound and instructional
 526 design skills. In other words, understanding how to align goals to objectives
 527 is a big one, how to communicate effectively with team members, that they
 528 would be able to understand the potential and limitations of WBI, because
 529 there is obviously both. For me, I would want them to be able to have very
 530 strong writing skills because that is not necessarily married to instructional
 531 design. I think that the best instructional designers bring that skill set. It
 532 would be nice if they had – and this really is not a skill – having had
 533 experience in working with WBI with clients who are very familiar to
 534 whatever project it would be. That is an important one. Being a team player
 535 which is so ambiguous, but that is a huge one. I think being able to take a
 536 systems perspective, that might have a lot to do with being a team player. So
 537 looking at a team from a system and understanding the roles that people play
 538 and why they play those roles. As for the degree, I would generally look for a
 539 master’s degree. Let me look at the question here. No, I guess beginning
 540 instructional designers would not have a master’s degree. I would expect
 541 them to be team players. I would expect them to have strong writing skills,
 542 and then that instructional design stuff that I said upfront.

543 Q16 Assuming you are hiring a person as an experienced instructional designer in
 544 Web Based Instruction, what skills are you expecting?

545 A16 What I mentioned above would apply to both. I think the more experience
 546 would be more autonomous. They would be able to do more things on their
 547 own, really kind of almost everything from a design perspective. Not
 548 necessarily from a development perspective, but from a design perspective,
 549 that they would be able to create the expected documentation that instructional

550 designers have to create, like design documents or content outlines or
 551 storyboards, those kinds of things, and a history of success in doing these
 552 kinds of projects. There are two things of leadership skills. One is being able
 553 to lead the instructional side of the project. That would include with client,
 554 with SMEs, all that kind of stuff, and being able to lead in a sense of being
 555 confident in your knowledge and skills and not being run over by a client,
 556 especially if it affects instructional integrity then a strong leader would step up
 557 and say, “We are not doing it that way because A, B, and C.” I think that is an
 558 important part. I think also, though, it is being able to lead in terms of the
 559 final – this is just the way that we have always done it and I have always done
 560 it – the instructional designer should be the lead of the final product, not
 561 necessarily the project, but the product. So because it is the instructional
 562 designer’s vision and design that then goes into making this thing. So if you
 563 use a metaphor of architecture and building, the instructional designer is the
 564 architect, but the instructional designer should not just draw everything up,
 565 hand it over, and then walk away. The instructional designer should also be
 566 involved with reviewing things as they are going, with answering questions
 567 from the developer as it is being developed, and then also looking at the final
 568 product before it is launched. So product leadership, I think that is important.
 569 I would only hesitate because you do not want to take ownership of the
 570 development, because you have people who are developing. If you are an
 571 instructional designer, you might be able to develop that, too. But you need to
 572 allow developers to take ownership of their work. So you can take ownership
 573 of the product from a subtle level, maybe in terms of before it goes to the
 574 client you take ownership of it so that it raises its level in your own personal
 575 motivation to make it as good as possible. But you do not really want to be
 576 fighting over ownership of something on a team basis.

577 Q17 Which direction do you see Web Based Instruction is heading to?

578 A17 I am going to separate that out from non-instruction. Instruction means design.
 579 Non-instruction means people going to Google, people going to an electronic
 580 support system and doing their own thing. That is what I am not talking about.
 581 But when you talk about instruction, this means something that is designed. I
 582 think we are seeing more experimentation with virtual settings, so where you
 583 would have a simulation or you would have a virtual game type of a situation,
 584 and these types of environments make it less chronological in terms of the
 585 way the content is delivered. I think that is a big one. It also puts a lot more
 586 hones on the learner in terms of the direction and the drive and the control of
 587 their own learning processes. That does not mean that there is no design,
 588 though. It just means that it is less directive and more learner controlled. So
 589 that is one thing. It seems to me that as the technology improves and has
 590 improved, there is more utilization of virtual classrooms. So you have
 591 instructors who are going synchronized classes in a virtual setting where you
 592 have distributed learners across wherever the geographic distribution might
 593 occur, maybe globally. I think that has really grown quite a bit, but those are
 594 very much instructional because in those virtual classroom settings often times
 595 it is very structured. It is scripted. The interactions if there are any, which

596 there most likely would be, have to be built in advance. So that would be a
 597 second major movement towards the future. I guess really a big factor in all
 598 of this is the cost overall is lowering, which is a game changer. That allows
 599 the bigger companies to do more, but also smaller organizations to be able to
 600 do it at all, so that is a game changer, too. It is not so much just that this is
 601 where WBI is moving from now to the future, it is rather than people are
 602 getting into it in the first place who have not had the opportunity to get into it
 603 before. I guess in conjunction with it, there is a push towards the conversion
 604 of existing materials that are used for face-to-face instruction, which still over
 605 all half of all instruction is face to face. The WBI is growing but it is still less
 606 than half. But you are seeing the conversion of these hardcopy materials into
 607 electronic materials and then being placed into some sort of WBI. I think that
 608 conversion of the existing probes of materials from facilitative instruction into
 609 web based is going to be a huge thing as well. Online class is primarily put to
 610 the autonomy of the individual instructor, whether they want to do that or not.
 611 What we are trying to do is move towards programs that do that, but still by
 612 and large it is whether the individual instructor chooses to put forth work and
 613 effort to do that. Even for online classes, we still have designated instructors.
 614 Generally speaking, it would be more a synchronized, but there would be
 615 room for a synchronized discussion boards, that kind of thing. But there are
 616 virtual synchronized meetings, as well.

617 Q18 What do you think an instructional designer should do in order to keep up
 618 with this direction?

619 A18 Well, it is being more self motivated to keep up with this new information.
 620 Specifically, I guess being part of professional organization helps, the ISPI or
 621 ASTD. Because often times they have their fingers on new technology. They
 622 are always looking to add value to the members. Often times that stuff is low
 623 hanging fruit, so that is one way. Becoming certified either through ASTD or
 624 ISPI is a big thing. Part of the recertification process requires ongoing
 625 education, which need it be through university coursework of other ways.
 626 That is one way to require yourself to be motivated to keep up your
 627 certifications. So that is another thing. Attending conferences, but really it
 628 just comes down to wanting to continually get better at your job and stay
 629 abreast of the changes and where the field is going. It really just kind of
 630 depends on where the focus is at the moment. Still the greatest focus is
 631 teaching, so often times the readings have to do with the actual classes. So
 632 getting new materials that would be able to go in there or if there are revisions
 633 to textbooks, keeping up on that, that kind of a thing.

634 Q19 Anything else that was not covered in our conversation but you think is
 635 important?

636 A19 I don't know. It seems to me that the biggest challenge to instructional
 637 designers is that by and large because of the nature of the job, it tracks very
 638 detail-oriented people. Those are the ones who seem to excel. The challenge
 639 is that those are the same kind of people, huge generalization here, who are
 640 less adapt at those soft skills or focusing on the relationship side of things or
 641 being the best team players that they can be. Do you know what I am saying,

642 all those kind of nontechnical skills. I think that to me that is the biggest
643 challenge within this field and this profession. Because the complete picture
644 of a person as part of a design team or development team or training arm or
645 whatever is being able to do that other stuff affectively as well. To me that is
646 the number one challenge with a lot of these folks being able to be complete
647 and whole a person as possible while focusing on those details things which is
648 a necessary part of the job, but also being able to be sensitive and aware of
649 some of the nontechnical things that can often times be just as important, if
650 not more so. Maybe that would be my big last thought.

Transcription of Interview 013

- 1
- 2 Q1 Good Evening, thanks for taking time with me. Can you tell me your current
3 job title?
- 4 A1 Yes, it is knowledge management leader
- 5 Q2 How long have you been working in the current position?
- 6 A2 Seven months till now
- 7 Q3 What's your age range: 25-35, 36-45, 46-55, and 56 above?
- 8 A3 I just made it, I am 36 to 45.
- 9 Q4 Would you say you are actively involved in instructional design?
- 10 A4 For the last seven month, my focus has been on knowledge management.
11 Before that, my entire career was instructional design. I just recently made a
12 career change. Well, I wouldn't say what I am doing is not instructional
13 design, it is different. Our department has two groups, one is on training,
14 another is on knowledge management. I feel as though we structure our
15 knowledge management system as instructional design principles although
16 some of my co-workers may not think that just because they do not have that
17 level of experiences. But when we organize our processes and document our
18 procedures, back in my mind I use my instructional design principles, maybe
19 they don't, but I don't talk about because I don't want to scare them. But
20 definitely I still use it, informally, use my instructional design skills for sure.
21 So, the answer is still yes, and informally.
- 22 Q5 Are there any other positions have you held before, that were related with
23 instructional design?
- 24 A5 yes, I spent my entire career as instructional designer and project leader about
25 twelve years.
- 26 Q6 How many years accumulatively do you estimate you have worked in
27 design/development for WBI?
- 28 A6 Web based, approximately for the last eight years.
- 29 Q7 In those WBI projects, how many years accumulatively do you estimate have
30 served as a lead instruction designer/developer?
- 31 A7 Eight years
- 32 Q8a What's the major of your bachelor's degree?
- 33 A8a I have a bachelor degree in Human Resources from Oakland University and
34 focus on instructional design,
- 35 Q8b Did you have postgraduate education: Master's or Ph.D.?
- 36 A8b Then I went immediately to my Master's degree in Oakland University and
37 my focus and project was on electronic performance support systems.
- 38 Q8c Have you had any other training on instructional design?
- 39 A8c No, just informal online learning things like that, seminars along the way, just
40 self learning, very informal. Throughout my career, I have had opportunities
41 on some of the contracts I have been worked on, the companies sent to certain
42 training and certifications in the past for the large companies I worked for.
43 Yeah, just kind of smaller seminars. There was a certificate, from one of the
44 companies I worked for, I forget the acronym now, you probably went
45 through the same thing years ago, it was part of the pro trainer series, train the

- 46 trainers, one of them focused on development. It was so long, can't remember
 47 it was three days or one week training, there was a development part of it, and
 48 I focused on that, because at that time, development was very different from
 49 facilitation. Some of them did not have to worry about that, but you know we
 50 were on the development side.
- 51 Q9 What's the business nature of your current organization: business/industry,
 52 education, government/military, health care, independent, other?
- 53 A9 Currently, uh, automotive, so it is business/industry.
- 54 Q10 What's the estimated size of the organization you are working for?
- 55 A10 Globally, it's possibly 200,000 employees.
- 56 Q11 Can you tell me a Web Based Instruction project you are very proud of or got
 57 highly recognized?
- 58 A11 I developed a help system informal training for gas dispatchers at a gas
 59 company in the area. The goal was to get these gas dispatchers – they needed
 60 an informal tool because they couldn't be taken away for classroom training,
 61 so we needed a learning tool that they could use on demand whenever they
 62 needed it to provide them the information they need to do their job. So we sat
 63 down with all of the subject matter experts, documented the processes and put
 64 them in a tool, made that tool accessible off of their desktops so that they
 65 could access the information at any time, and the whole goal was just to
 66 improve the proficiency with these tasks that they had pre-defined. So that's
 67 kind of a high level.
- 68 Q11a How many team members in the project?
- 69 A11a There was three of us. There was a project manager, who's really just
 70 responsible for the timeline and the budget, and he was on the company side;
 71 he was an employee. And then there was myself and another person who took
 72 lead roles on various parts of the project, because we did a combination of –
 73 there are different types of learning. We documented the process then we did
 74 simulations and things like that, so along the way each one of us took a lead
 75 on a certain part of the project. Yes, this is really for in-house training. We
 76 were both designing and development, it really was, because I was thinking
 77 through that, and we really did team up on this and we could be considered
 78 co-project leaders because we were both responsible and – it was kind of nice
 79 because we were able to bounce ideas off of each other, but in the end it was
 80 up to both of us to make decisions and things like that. Again, one of us would
 81 take a lead on the – because once we did our task analysis, one of us would
 82 take a lead on creating the tasks via text, and then the other person would do
 83 the simulations, and we kind of switched. It was kind of nice because we
 84 didn't get bored, you know, because we were kind of switching jobs.
- 85 Q11b How long did it last?
- 86 A11b That lasted a year. We came down to 70 tasks that they had to accomplish.
 87 But with that said, those 70 tasks involved six different computer systems. So
 88 for example, when somebody called in with a gas leak, that would go to the
 89 gas dispatch system and they would have to do everything from determining
 90 the severity of it to assigning it to a person, then following it along, maybe
 91 assigning more people. So there were many tasks along the way. They had

- 92 large monitors with different software, so we had to incorporate a lot of
 93 different software into this, and that's why the only – we had to do
 94 simulations of this, of course, so that we could actually show what it's
 95 supposed to look like for the use, so the user could actually have our system,
 96 our help system, open and watch the simulations as they're doing it. So, it
 97 could be used for training, then again afterwards, it could be used for support
 98 reference tool as well. It was great.
- 99 Q11c What was the project about, was it about how to complete a step, process, use
 100 systems, or how to perform physical jobs, or change attitude/value?
 101 A11c It is about process and using systems.
- 102 Q11di Describe the project in a very high level (the process by stages)
 103 A11di The first thing we did is, at high level, we did a kick-off where we got to
 104 understand what the customers' needs were, were high level. After that, we
 105 found out – from that we found out who are audience was, who our
 106 stakeholders were, we found out the goal, you know, at a basic level from
 107 kind of a high-level perspective. And then the next thing we did was we went
 108 into the task analysis; that's where we determined it was approximately 70
 109 common tasks all of the different individuals needed to know. All the
 110 dispatchers, they needed 70 tasks in common. From there, we quickly went
 111 into a design session, and we determined that a tell-show-do model would
 112 work best with us. We wanted to give them different ways, made sure we hit
 113 all of the different learning styles. So we did it with text, with simulations, and
 114 then a bit of a test. And then we implemented this system into their network,
 115 created a shortcut right off of their desktop. That was the implementation. And
 116 the assessment was great because supervisors would sit next to them, watch
 117 them use the system and make sure that it was useful for them. So, we walked
 118 away, knowing from a supervisor's perspective that they were happy; they
 119 saw the efficiency improvement with these employees, so that was very
 120 gratifying. That's at a high level.
- 121 Q11dii Describe the project in as much low level (steps, tasks) as possible
 122 A11dii Again, with the kick-off meeting, we had some very specific questions. We
 123 wanted to know exactly what our demographic was, exactly who the audience,
 124 exactly what the goals were. And from there, again, we went into that
 125 analysis, and with that, we wanted to make sure we met with the supervisor to
 126 get their perspective. We met with the SMEs, the expert performers, so we
 127 would know how things are supposed to be done. And then, so the supervisors
 128 and SMEs/master performers, we determined exactly what tasks needed to be
 129 performed by all of the advisors. Not yet, there was nothing that was written.
 130 That was what was so strange to us, because – and that's what took so long,
 131 because we didn't have any material to go off of. It was what they call "tribal
 132 knowledge," you know, one person would sit next to an expert performer. But
 133 the problem was they would take away from that person's productivity
 134 because they would have to answer all their questions and everything like that.
 135 And then, that's kind of how they would learn, but then they would – because
 136 there was so much throughput, there was so much going on that they were
 137 finding this was such a great waste of time and they didn't have a lot of

138 dispatchers, and they were going to be bringing new people in and things like
139 that, so that's where they decided that they needed a tool. And on the other
140 side of it, they also wanted to 'commonize' everything; they wanted to make
141 sure that the guys that were out there were all doing exactly the same thing
142 right. Actually, yeah, by the end, we did know the process, which is, you
143 know, so many training courses at the beginning of the year, and now by the
144 end, you could almost do that job. So it was interesting, we had great SMEs
145 and we sat down and we – so that we wouldn't waste too much time, they
146 assigned us with four or five, I believe, and we would sit down with them. At
147 first, we would document all the steps and then we would simulate it. We take
148 them off-site; they had to pay them overtime so we had to be very efficient
149 with that, and these were union members as well. Yeah, so that was a big
150 lesson learned. So we would record the simulations, we went through and
151 documented all 70 of those exactly. And that's what took so long, because we
152 would do it, we would check with the different people to make sure we got it
153 right, and then checked with the supervisor to make sure it was efficient
154 according to them. So that's why it took so long – because thinking back I
155 thought, "Wow, this was a long project," but then I realized all of the steps
156 along the way and all the checks and balances we had to do to ensure that we
157 were doing it the most efficient way, as well as the acceptable way by all
158 parties involved. So, yeah, it was very interesting. So once we had everything
159 recorded, once we had it documented and then recorded, we put it into
160 RoboHelp software, and that's what helped us organize all of the content. And
161 the great thing about RoboHelp is that it allows for searchability and things
162 like that, so after people go through it one time, they can go through it again
163 and maybe just search for a specific task that they want to perform. Again, the
164 way that we organized it, first in text, and then we did it with a try-it
165 simulation where the user could go in and we gave them support if they had a
166 wrong click or whatever, we would show them the right way to do it, and then
167 there would be kind of the assessment simulation where we took away the
168 support and they had to do it the correct way. But that wasn't even the
169 assessment; the true assessment was when they sat next to the supervisor, so
170 they had a few different levels of practice before they were even assessed by
171 their supervisors. Yeah, they would sit next to their supervisor, their
172 supervisor would watch them, they would give them a task, they would say,
173 "There's a gas leak in this location, what would you do now?" or "You need
174 to send another person there, what would you do now?" So they would sit
175 there and watch the dispatcher go through the process using our tool and make
176 sure that the tool efficiently got them to where they needed to be. We gave
177 them – they came up with the tasks. So the supervisor would give them a task
178 and then the supervisor would just watch as they interacted with our system
179 and with the true system, so with the help system and with the actual
180 computer system, and they would make sure that everything they did was
181 efficient and consistent with what was said in the help system. It was up to the
182 supervisor, because they wanted to make sure – because we had said we could
183 do an assessment with them because we use Captivate, and they said, "No, we

184 want to watch them.” And it may have had something to do with their union
 185 agreement – that could be; I’m not sure about that. They were not allowed to
 186 give a grade or something, yeah, some unions – not a pass or fail or anything
 187 like that. So that’s what we did. We, of course, piloted it—that was kind of a
 188 step that I missed—we piloted it with an audience to make sure that we got
 189 everything right, to make sure it was understandable for them. After the pilot,
 190 then we rolled it out. The great thing was is when we were done—I know that
 191 question will come later; I’m getting a little bit far—but it was exciting
 192 because we had to build this relationship. We were the youngest guys there.
 193 This is a very mature crowd; they all had 20-30 years experience at this
 194 company before they got involved in the dispatch. They were all on the line
 195 cruise and things like that in the field. So when we first showed up, they were
 196 kind of like, “Who are these young guys that are going to tell me what to do?”
 197 But then by the end, they threw us a party with cake and ice cream so it was
 198 so great. Yes, that’s right; I know that question comes later on, but... The nice
 199 thing was we were able to use—and now that you’re asking me that, it’s
 200 making me think about that—we had... it was more of a straw model. We just
 201 went in and made sure that we had all of our tasks documented. It was
 202 somewhat of a rapid prototyping model, because I remember we went in, we
 203 gave them an idea of what it was going to be, and we kind of sketched it out, I
 204 believe, more like in PowerPoint. We kind of designed it that way to give
 205 them an idea, because I think it helps people visually when they can see it
 206 with a tool like that, so we showed them what we would do and then they
 207 agreed to that. So really, the design was probably more graphic, just showing
 208 them what it would look like and then showing them how the text and the
 209 simulations would work together to get this information across. And the
 210 design happened very quickly, because if I remember correctly when we
 211 began, he and I both had an idea of how this would work, so in our minds, we
 212 kind of – we already had a design in mind and it just kind of made sense. And
 213 then from there we knew that we’re going to – because the company had used
 214 RoboHelp; of course, they had licensing for that. They used Captivate; they
 215 had licensing for that. And it just kind of seemed to work with what we
 216 wanted to accomplish. I remember that we set some rules for some of these
 217 tasks, as we’re talking, it’s making me remember. Because, of course, when
 218 we sat down with the SME, they said, “Okay, you need to do this and this and
 219 this,” and before we knew it they had 30 steps, and we would say, “Wait a
 220 second, is that just one task?” They said, “Yeah, you go to this system and this
 221 system,” and I said, “Well, wait. You’re doing that and then this. Those are
 222 really two separate things, right?” They said, “Oh, yeah, I guess so.” So that
 223 was a great way to help us chunk information, because we would put it down
 224 and – again, it would be so long, we would tell people, “Try to remember
 225 when you were new. Do you think you’d get lost somewhere in all of these
 226 steps?” And they’d say, “Oh, yeah, that makes sense.” So, I remember many
 227 of those times where we would have, you know, we just let them go and we
 228 start documenting and they say, “Okay, now you go over here and then you go
 229 over here and then you go here,” and we’d say, “Well, wait a second. Yeah,

230 this is very long and, you know, somebody's probably going to get lost. Can
 231 we think of a way to chunk these up more?" So, yeah, it could be both, design
 232 and task analysis, it really was prototype in design phase. And to be honest
 233 with you, that's... I found that – I truly like prototyping; it's the way that I
 234 work best because I'm very visual, and so I guess some of my customers have
 235 been forced to be visual. I like to make sure I get a scope documented to make
 236 sure that I have all of their needs documented. "Here's what we're going to
 237 do, here's our goal, here's our objective"—you don't need those objective
 238 words or whatever—but "here's our goal and here's all the things that are
 239 going to make that goal happen. Is that okay with you?" And then from that,
 240 sometimes I'll put an outline together, but a lot of times, it was some of the
 241 tools that I've used in the past. You can kind of go right in and begin
 242 structuring it, so then you can show your customer: "Is this what you're
 243 thinking?" When they see it, "Oh, yeah, okay, I see." And then, us, as
 244 instructional designers, we can use layman's terms, say, "Is this your goal for
 245 that? Are these the kind of goals that support that?" And then we can start
 246 asking the questions of how to fill things in. So I kind of like the rapid
 247 prototyping model in that I think it helps people visualize the end goal, as
 248 opposed to just kind of trying to talk them through it in an outline or
 249 something like that. So that's kind of how I work. With that one, we did not
 250 have audio; it was strictly text. The reason for that is they're on the phone, so
 251 they have headsets on and they have to be listening to the customers, so if we
 252 had audio it would interrupt with the customer's voice, or it would be – yeah,
 253 they constantly have headsets on. So everything needed to be just visual, yeah,
 254 in text, so we would – but in Captivate, we would have the balloons pop up,
 255 explaining everything. But, yeah, we couldn't use audio, because at any time,
 256 they could be communicating with somebody and that would interfere with
 257 that one. So, the simulation recorded what people were doing – so what we
 258 would do is we would record it in Captivate, so we would sit down, we would
 259 take them off the phones actually into a different building so they wouldn't be
 260 interacting with any of their peer. So we brought them to a different building
 261 and then we sat down with them and we would call up... I'm trying to
 262 remember... no, we recorded or we loaded Captivate onto one of their
 263 machines—because the company had a license—so we recorded in Captivate
 264 on there and they would go through and then we explained to them how
 265 Captivate works – you need to go really slow. But we actually did record their
 266 voice, but it was only for us, because we'd say, "Please talk out loud and think
 267 out loud," and they spoke very plain and slang and things like that, but we
 268 went in, we took that information and that's what we used for our callout and
 269 things like that. And the other thing we did is we said, "Please think out loud
 270 and please explain your steps," because that became some of our text as well.
 271 So we used that audio as the callouts, but then a lot of it is that's how we
 272 began to document the process that way. Yeah, it worked well; it worked very
 273 well. The hard part with that, I think, is getting people comfortable with
 274 thinking out loud, because a lot of times they're afraid that they're going to
 275 make a mistake. And that's one thing I found when recording people; it seems

- 276 like pretty much the first hour, it's just their anxiety and you're going to have
 277 to re-record that, so you just kind of let them practice like, "Here, just play
 278 with this," and then you show them what happens. They're like, "Wow, that's
 279 what I did." "That's okay. Now, this is for real. Now take your time in
 280 clicking, and please tell me what you're doing along the way." It worked out
 281 very well.
- 282 Q11diii What event/communication marked the beginning of the project?
 283 A11diii I would say the kick-off meeting, where we established all the goals, the
 284 SMEs, the stakeholders and the audience that we're going to be working, too.
- 285 Q11div What event/communication indicated the completion of the project?
 286 A11div Yeah, the party, it was so great. Because we loaded the system onto their
 287 network and we made a shortcut on all the dispatchers' work stations, so they
 288 could right there launch the system that way. And we were very surprised
 289 because we kind of thought back to the first day that we showed up and they
 290 were all kind of looking at us like, "Who are these young guys?" and a year
 291 later we had built all these relationships and then they're throwing us a party
 292 when we completed it. It was great. We didn't have to go back, unfortunately
 293 – I know that they had it; I think they've gotten it. This was in, I believe, '05
 294 or 2006 when we did this. So I'm hoping that they went in and made updates,
 295 but as you know, sometimes, people, they lose budgets and things like that
 296 and some things can't get updated. So I only hope that – because once we
 297 completed it that was the last that we had heard of it and... I was with this
 298 company for a year after, and I know that at least for a year after they were
 299 using it, but after that I went to another company so I don't know what
 300 happened after that.
- 301 Q11dv What was your role in the project?
 302 A11dv Well, it was... yeah, we were responsible for everything, and even making
 303 sure that we stayed within the budget, so we knew... but we knew that they
 304 were relatively flexible. The good thing was the customer, the project
 305 manager, knew how big this was going to be, so they said, "We know this is
 306 potentially a year-long project," so there really wasn't an issue with the
 307 budget. We just knew, okay... and we did a good job. We used Microsoft
 308 Project and documented every step along the way, gave ourselves plenty of
 309 time for... because, as you know, things happen and whatever. So it was truly
 310 a project, where from the very beginning we were responsible for organizing
 311 everything. And the interesting was a lot of time we had to work third shift, so
 312 we had to go in at 8:00 at night and work till, you know, morning. But we had
 313 to organize all of our meetings. We had to organize who we were going to sit
 314 down with, the simulations and things like that and then make sure, because at
 315 this time, part of the training department within this group has contractors
 316 even so we had to meet with them and give updates and things like that. It was
 317 a great experience. I don't remember there being any battles or anything like
 318 that, and I think it's because at that time, that was pretty new technology and
 319 that was a pretty new way of looking at learning, you know, this just-in-time
 320 training, performance improvement perhaps, and they were just so excited
 321 about it because they had nothing else. I mean, everything was new and they

322 were excited so we didn't have any battles to fight or anything like that. So,
 323 yeah, it was really our jobs to be kind of ambassadors, to make sure that they
 324 all knew that we're there to help them, you know. We're not there to
 325 outsource it, because I think that's the first they thought when we got there,
 326 was we're there to document everything and then outsource their jobs. And
 327 we said, "Oh, no, no, no. This is for you." So that was – a big battle was
 328 getting them comfortable with us. That's what we defined right up front,
 329 because we wanted to know who all the stakeholders were. Because, as you
 330 know, often you'll begin a project and say, "Oh, yeah, I have the final say on
 331 this," but when the time actually comes, you'll find out, "Well, no, you need
 332 to get this executive director to look at it." So we said, "Who are all –
 333 everybody involved?" So we had our subject matter experts and then the
 334 supervisors. And the supervisors had management buy-in to make all the
 335 decisions, so we knew that once the supervisors approved it that we were all
 336 set. The management did view it at the end, but they were communicating
 337 along the way with the supervisors, so we knew that we had final buy-in and
 338 there would be no extra input at the end. It was us dealing with UAW. We
 339 were introduced to this group and we knew that they were union members.
 340 The one thing that we had to be cognizant of was breaks, so we would, you
 341 know – you have to get a certain break time and then you have to... with the
 342 assessments, we had to be careful. There weren't a lot of rules but, again, just
 343 being open, you know, because I would sit down with them and say, "Okay, I
 344 don't want to break any rules, so you let me know." And they were, the ones
 345 assigned to us, were open and generally happy to work with us, of course,
 346 because they getting overtime as well. But we had to work quickly because
 347 they were on overtime, you know, so once we'd get recording it... I'll never
 348 forget, I was recording, somebody that was on the third shift, I was recording
 349 with him in the morning and he kept falling asleep. And I thought, "Oh, geez,"
 350 so I kind of... here I am thinking, "He's getting paid all this money and he's
 351 falling asleep," so here and there I'd have to call for whatever and he'd wake
 352 up and then we had to re-record, yeah. The supervisors were very supportive,
 353 which was – and that's why this project had a lot of buy-in from the very
 354 beginning. They were good, yeah. And I think that's why – I use it as an
 355 example because things seemed to happen as they should. They had buy-in
 356 from management, the supervisors were in line with the management, and
 357 then – because, as you know, you have to have that buy-in and the people, the
 358 workers, have to know that managers are counting on them to do this. And the
 359 managers feel that this is important, because otherwise they're not going to do
 360 it.

361 Q11dvi What software and services were used?

362 A11dvi As far as software, we used Captivate to record the simulations, Microsoft
 363 Word to document the processes, RoboHelp to organize everything, and here
 364 and there we'd have to use PhotoShop to touch up a screenshot on something
 365 or whatever, you know, because we may have to change a screen on Captivate
 366 so we could PhotoShop something and then bring it into Captivate that way.
 367 So, yeah, those are the software that we used. No outside services, we did it

- 368 all ourselves, and that was another interesting part, because – yeah, I guess
 369 that’s another part, is we had to manage our time as well because we were
 370 doing all the developments. We were responsible for managing all this but
 371 then also doing the development as well. I don’t remember it being an issue.
 372 We did a good job of laying out our timeline and laying out what needed to be
 373 done, so it seemed to flow, you know, as we had planned it to, so it worked
 374 well. The timeline... no specific plan saying ‘do this, this, and this by when
 375 when and when’, we knew that they had given it a year, so the project
 376 manager obviously knew. And I don’t know if they knew it would take that
 377 long, but that’s what they allotted for and then we went in. Once that analysis
 378 was done and we really knew what we had gotten into, then we said, “Okay,
 379 well, now it’s going to take a couple of months to get all these things done and
 380 then we’re going to have to polish it all up and that sort of thing.” So we had
 381 all our milestones all laid out and gave ourselves a little bit of padding in there
 382 too for things that come up. Periodically we update the manager, they would,
 383 and that was kind of the nice thing of having this, because we could show
 384 them, like “Here’s the simulation that we have recorded, here’s how many
 385 things we have documented,” so we could literally – since we had this
 386 prototype going on, we could literally show them where we’re at and they
 387 could see, “Oh, okay,” you know, we didn’t have to tell them about something
 388 that’s out there somewhere on the web. You know, we could literally show
 389 them where we’re at.
- 390 Q11dvii What hardware and devices were used?
 391 A11dvii That PC was really it. They had – everything was off of PC. They did have
 392 kind of a specialized... because they had so many pieces of software, they had
 393 large monitors that they used, so we had the design for that, you know, for a
 394 large monitor. But, yeah, everything was off of a PC. No gas equipment,
 395 nothing like that – luckily. We were just in an office so, yeah, that was – it
 396 was interesting, though, to learn how the process works, yeah.
- 397 Q11e What were the outstanding features of this project?
 398 A11e I would say the thing I like the most is how we tried to cover different
 399 learning styles. And we noticed that the much older and—I don’t mean to age-
 400 discriminate here—but the much older gentlemen liked just the step by step;
 401 they didn’t want anything to do with the simulations, they just wanted, “Step
 402 1, I go here; Step 2, I go here; Step 3...” Some of the older ones liked the
 403 simulation and they would follow it along, so we had the text for folks that
 404 just wanted the text, and we had the simulation if they just wanted to watch
 405 the simulation. And then after that, we had the practice where we took away
 406 all of the hints and everything and you could kind of practice to make sure
 407 that you got it right before you sat with your supervisor. So I think that was
 408 great in the level of detail, because we gave ourselves so much time; the level
 409 of detail we went through, it was just great. And to sit there and watch these
 410 dispatchers follow along with the tool that we had created in there,
 411 accomplishing these tasks, it was great. So, that’s what I would say.
- 412 Q11f Did it occur to you that you wish to have done the project differently?

- 413 A11f No, I don't think so. I was pretty – when reading this question, I did see the
 414 challenge part. I can't think of anything that we would have done too much
 415 differently, but the challenge was the gentleman that we were working with
 416 and... what I might have done is even sooner work on that relationship. Now
 417 that I think about it, I think we could have right off the bat, because we didn't
 418 really... we were just introduced to the group like, "These guys are here to
 419 develop some training." Looking back now, now that I think about it, we
 420 should have went around to each person, to each guy and gal, introduced
 421 ourselves, and let them know exactly who we were and that we were here to
 422 develop a tool for them. Because I think it took a couple of weeks for them to
 423 realize that we were there to help them and not to document their jobs to
 424 replace them. So now that I'm thinking that through, again, that's probably
 425 something that would have helped us out even more, is if we would have, that
 426 first day, just walked around, took an hour, and just introduced ourselves to
 427 each guy and say, "Here's what we're going to do. We're going to be looking
 428 for your help." We kind of waited to do that and we did it – as we needed
 429 somebody, then we would introduce ourselves to them, kind of bring them in
 430 to do the simulations and things like that, so we should have probably done
 431 that right up front.
- 432 Q11g What were the solution(s) to the challenge(s)?
- 433 A11g It was tough. The interesting thing about them, I only had that one time where
 434 that guy fell asleep. One thing we found out is it's typical for them to do
 435 double shifts, 16 hours straight. There was one person that occasionally would
 436 do a triple, would work 21 straight hours, you know. So they were used to this
 437 and they were... I was very impressed for—again, I don't mean to sound
 438 bad—but for their age, they were very skilled with these different systems.
 439 And then at the same time, they did take plenty of breaks, which was, you
 440 know – I believe at least every couple of hours, they took a break, and they
 441 had a room off the back of the dispatcher area, where they had couches and
 442 chairs and they were told to take a nap, so they would. They have an alarm in
 443 there, so they could set it, they'd take a nap and get up, so that probably
 444 helped out as well. But they were very used to this type of work, which I was
 445 impressed. It was unbelievable; a couple of fellows just... yeah, and they're
 446 dealing with very important issues. People had gas leaks and things like that
 447 and you have to make sure you get somebody to that house because it could
 448 explode, you know. So, yeah, I was impressed; I was amazed. Yeah, we never
 449 worked with anybody that... the people that we recorded, they only worked
 450 one shift because they didn't know how long they would be with us. So they
 451 would work a shift and then they would drive from their location, which was
 452 in an area of Detroit to another location, so at least they had that time to wake
 453 up.
- 454 Q12a What specific knowledge, concepts, and ideas that helped you?
- 455 A12a When I was working on my master's degree, I focused on performance
 456 support, and when I was going through it, I interviewed some of the experts in
 457 the industry. It was such a great learning experience, and there were so many
 458 theories and so much that they gave – I never lost any of that. And I think that

459 a combination of that... as well as people that I've worked with have also had
 460 similar perspective, so I think that helped me a lot with this project, because it
 461 was very important that we made this a performance support – I mean, it truly
 462 was; it was just-in-time training. And I think that my educational experience,
 463 as well as some of my peers that I was working with previous to this, I think
 464 that experience really helped me when this came up because it made sense to
 465 me the solution that we needed. This classroom training wouldn't have
 466 worked; it didn't really have time to take a couple of hours' worth of
 467 eLearning. It really needed to be just-in-time performance support type
 468 training. So I think the education plus experience from my peers helped with
 469 that. It was decided it was just-in-time, because when we were initially
 470 starting the project, we knew we couldn't get them in a classroom because
 471 they couldn't leave for that period of time, and we also knew that an
 472 eLearning course wouldn't really work, and I have a feeling that was because
 473 of the length of time. It just made sense that we—because we even had to
 474 suggest that because they kind of gave us their limitations where they only
 475 had a little bit of time to do this, and so we said, “Well, let's put together this
 476 help system, this performance support tool, and we'll structure out the
 477 learning. We'll make sure we get the objectives down. However, they can
 478 access it when they need to get the information they need to do their job. My
 479 perspective is if you have to train somebody to use a tool, then you failed. I
 480 think, especially today, but even then, we knew that they were – we knew our
 481 audience was technically savvy. We knew that they were really fast on a
 482 computer, so we knew that they knew how to open and close and change
 483 between windows and things like that. So we knew that when they opened this
 484 up, it should be exactly... there should be no questions asked, and that was
 485 part of our pilot, you know. The hardest part is sitting back, not saying
 486 anything, and just letting... so that's what we do. We said, “Click that,” and
 487 then they'd go through and we had all of the tasks to find that was very clear
 488 in their terms—all these tasks—and they click on, okay, that's what they do,
 489 and that was it. But in general, if you have to describe—in my perspective, to
 490 this day—if you have to explain to somebody how a job aid works, then I
 491 think you failed.

492 Q12b What soft skills did you use?

493 A12b Communication was absolutely the key. We had that open line of
 494 communication and then that communication helped us to build a relationship.
 495 I learned so much – and, again, just talking to you, it led me to realizing that I
 496 should have introduced myself to them sooner, but I personally pride myself
 497 on the relationships that I built with each one of the projects that I've done
 498 since my career first began. Because it isn't until you gain—and then with
 499 communication comes trust in these types—it isn't until you gain the trust of
 500 your customer and/or your subject matter expert... it isn't until that point that
 501 you're truly going to get what you need. When they trust you, then they know
 502 they can tell you the little things or the secrets or the whatever, you know.
 503 And then they also, when they trust you, then you can help them to realize that
 504 this is their project as well and they have ownership. And then I feel that from

505 there, the project goes much smoother, but I think that all revolves around
506 open communication. Yeah, picking their brains is hard, it is. The funny thing
507 is, and like I said, a lot of times you would say, you know, “What task do you
508 need to do?” They would say, “Well, here’s the task.” We would say, “Okay,
509 what steps are involved in that?” And then they would give us 40 steps. We
510 would say, “Okay, that’s great. Those 40 steps, I’m sure, are very important.
511 But I bet you, does it maybe stop right here with this task and this one starts
512 up here?” “Well, I guess it could.” And then we would kind of have to talk
513 them through, “Okay, let’s say I’m showing up here for my first day at work. I
514 don’t know a lot about this stuff. How would I proceed in this?” “Yeah, I
515 guess you’d have to do that first.” So, we would have to talk them through and
516 really... because when you’re so close to something, it makes perfect sense to
517 you, and it’s just kind of out of reaction that you do these things and you don’t
518 think through. That was definitely part of it; it was really getting them to
519 break down the process into even smaller tasks. I think you really have to be
520 very open and when you’re—hopefully I’ll answer your question at some
521 point through this—but the one thing, another thing that I like doing is kind of
522 figuring people out and figuring out what I need to do to get the information
523 from them, so personally – my father was in a union for 40 years, so I know
524 that at some time union members can be very aggressive and they don’t want
525 you stepping in their turf, you know, that sort of thing. And also, living in the
526 Detroit area, I mean, I think you get to learn... just by default, you learn about
527 unions because there are so many unions around. But you have to really... one
528 thing that I like doing is kind of sociology, but really reading people and
529 finding out; you know, when you’re talking to them, you can find out just
530 reading their non-verbal whether or not they want to be there or they don’t.
531 And if they don’t, I enjoy kind of changing their perspective on things and
532 changing their opinions perhaps. But, yeah, I think that you really have to, for
533 me, I kind of used the experience of my – I remember my dad talking about
534 things like that, of union. I remember him talking about that. And then at the
535 same time, having worked in the auto industry, I had an idea, but then in the
536 news, you also hear about union stories and things like that. So, I kind of
537 pulled on all those different experiences for this. Would they have a problem
538 with working with union people? I think so, yeah, because if you just show up
539 there very aggressive and say, “Here’s what we’re going to do,” they will shut
540 you off, you won’t get anything from them, they’re going to say forget it and
541 they’ll just do that absolute minimum and they’ll make your very difficult. It
542 could be the same for anybody. I think in that environment, it’s even more so
543 because they have the backing of the union and you can’t go after them. You
544 have to go after their representatives and then they’ll file a grievance, and
545 then... oh, that’s even – it’s like a legality issue, you know, it can get too big.

546 Q12c What hard skills did you use?
547 A12d I would definitely say ISD skills, but then at the same time, you know, we
548 were the ones that were creating the animations and the simulations. We were
549 the ones that were doing the photo editing and things like that, so it’s very
550 technical, which it truly was enjoyable because we were able to consider it

- 551 from a theory perspective, “Here’s our ISD skills,” but then at the same time,
 552 go in and do the animation and the simulations.
- 553 Q12d What attitude did you realize that was helpful for the success of this project?
 554 A12d Yes, that’s exactly the mode that I have. You have to stay very open with the
 555 group but then at the same time very transparent and just – even show them.
 556 And that’s another thing; I mean, when I think about this, we even showed...
 557 some of the dispatchers have told us, “What are you guys up to?” And we’d
 558 bring more, “Here, here’s what we’re looking at.” We would show them,
 559 “Here’s the tool that we’re working on for you guys.” And again, I wish I
 560 would have done that a little bit sooner even to kind of break down the
 561 barriers, but it was very helpful that we were very open with them. We tried to
 562 build the relationship and then kind of showed them what we were doing.
- 563 Q13 Which year was the project? What do you wish to have known that you didn’t
 564 know back then?
- 565 A13 It was actually in 2006. I didn’t write a note on this one. Yeah, I can’t... yeah,
 566 I think that... it would have been neat to know that they’re going to accept us
 567 so well and know that they were going to throw the party, but... yeah, it was
 568 interesting. I don’t think I would have changed much about that project.
- 569 Q14 What are the other knowledge, skills or attitude which were not used in the
 570 above project but you used in other Web Based Instruction projects you led?
- 571 A14 I don’t know exactly how this would be defined, but I found that when I’m
 572 responsible for projects and teams, leading by example, I think, is just the best
 573 way to go. I’ve never been one to sit over somebody’s shoulder and point
 574 things out. A lot of times, the projects that I’ve done, I’ve also had a role in,
 575 not just a manager but I’ve also had a role in the process, so... and generally
 576 they’ve been very large projects, so what I like to do is stay close and check
 577 in, but lead by example, so show hard work, make sure I’m meeting all my
 578 milestones, make sure I’m keeping the customer happy, I’m interacting with
 579 my team members but I’m also interacting with the customer, and also
 580 keeping our leader up on all these things – so that’s probably what I enjoy the
 581 most, is being a team lead. For example, if we had a course and there was
 582 three of us out, maybe I would handle one or two modules and split the other
 583 two up amongst the other two people, so then I could keep an eye on what
 584 they’re doing and I would have my own, because I’ve never wanted to lose
 585 those skills, so I’ve never wanted to be totally hands off and just say, “You do
 586 it,” because I do enjoy it and I work very hard to get the experience that I’ve
 587 had. But then I also like interacting with leadership and showing them,
 588 because I think when you do a good job of that, it just makes your job easier,
 589 because then they understand everything that’s involved in the project, you
 590 know. If you just show up with something at the end, they’ll say, “Oh, okay,”
 591 but if you keep an open line of communication with your leadership and
 592 explain to them this process – because nine times out of ten, they’re probably
 593 not instructional designers; they’re probably from another area, you know,
 594 they have been brought in to handle this project. So, if you show them, “Okay,
 595 we’ve completed our analysis, here’s what we think, now here’s our design
 596 and here’s what we’re developing, here’s the graphics that we’re using,” and

597 then their eyes really open, like, “Wow, not anybody can do training. It takes
598 expertise to do training.” Kind of educate them, absolutely, and when a
599 manager sees—because a lot of times, they’re familiar with the content but
600 they don’t understand how we put it together—but when they see that process,
601 it really opens their eyes and they really see how critical it is to have these
602 skills and to use them properly. They appreciate you more.

603 Q15 Assuming you are hiring a person as a beginning instructional designer in
604 Web Based Instruction, what skills are you expecting?

605 A15 As a beginner, I want them... first of all, creativity is very important... open-
606 minded. I really would want to see what they’ve done. I’m assuming they’ve
607 done some work, some basic work, because – and you can tell very quickly if
608 somebody has message design skills or if somebody can lay out instruction
609 that’s very clear and that you want to see, not something that’s just so plain
610 and so boring that you wouldn’t want to take it yourself. And for a new person,
611 I want them to love to gain experience and to try new things, so to be very
612 open. So, as a new person, those are the things that I think are very important.

613 Q16 Assuming you are hiring a person as an experienced instructional designer in
614 Web Based Instruction, what skills are you expecting?

615 A16 The creativity skill – and I think now, more than ever, people are expecting
616 great things when they take a training course. There’s so much rich media out
617 there, you know, Flash and simulations and animations and interactivity. I
618 think over the past, I think learning has changed so much – yeah, I was going
619 to say the past three to five years. It has probably changed more in the three to
620 five years than it did the ten years before that and so much of it is just because
621 the technology. Some people like these terms, some people don’t. But I think
622 you have to introduce a certain bit of “edutainment.” That’s... I don’t know, I
623 heard that somewhere – edutainment. Because if you want to get information
624 about how to make cookies, you’d probably go to YouTube, and people want
625 – if somebody’s talking to you, you see what they’re doing, if there’s
626 somebody tasting it, it’s good—I mean you can’t taste it on a computer—but
627 that... I’m jumping ahead to one of my other answers, but... Somebody that’s
628 experienced, I think they need to understand these things. They need to
629 understand how learning has changed. They need to have experience with
630 multiple types of learning, be it somebody that’s done a full curriculum, you
631 know, somebody that’s had a very structured curriculum. I want somebody
632 that’s put together job aids. I want somebody that’s done just-in-time training
633 or things like that, you know, performance support. I want somebody that has
634 a good eye for visuals; you don’t have to be a graphic expert but a good eye
635 for what looks good, an idea for color and things like that. But the key is that
636 they understand what will make somebody want to take something that
637 they’ve developed, whether it be a course or something else, and they
638 understand what makes learning stick to the learner. I would say, yeah, it did
639 say project management. I think as long as... yeah, I guess I kind of – because
640 I think so often now, learning experts are just expected to be project managers,
641 you know, because you don’t have the teams of people working on project
642 anymore. So often, it’s one person that’s responsible for the whole thing.

643 Sometimes you get some graphics support, but typically you're responsible
 644 for the whole thing. So I think by default – actually I think a lot of
 645 instructional designers have a lot more project management skills that they
 646 even think of, just because they have to do it all, manage their time and
 647 everything else, kind of internalize, that's a big job. Expect them to have a
 648 degree? Definitely. I have very good friends that have bachelor's degrees,
 649 very creative, just didn't have the time to take on a Master's degree, extremely
 650 bright. So I think at least as long as you have the basic theory, you have a
 651 degree that at least you understand some of the adult learning – how adult
 652 learning is a little bit different. And I think Oakland... its program is
 653 improving all the time. I know Wayne State has a good program. So I think
 654 it's important that you understand these theories, that you understand why it's
 655 important to keep them in mind, but at the same time, understand that those
 656 theories don't work in every instance and that you have to be open, so I think
 657 a strong educational foundation is definitely important. But, yeah, I wouldn't
 658 necessarily require a Master's or anything like that. I would look more at their
 659 experience and the projects that they've done. But, yeah, I think a Bachelor's
 660 degree is important.

661 Q17 Which direction do you see Web Based Instruction is heading to?

662 A17 Yeah, it is such an interesting time. Over the last six months, I've looked a
 663 little less than I did before just because of my path right now, but things are
 664 changing dramatically. Today, I think instructional designers have to have an
 665 incredibly open mind because there are so many things that they need to pay
 666 attention to. They need to pay attention to the technology, because within two
 667 years, everybody's going to be designing things for a tablet, like, "Oh, you're
 668 off a desktop? What do you mean a desktop? I don't even know what that is."
 669 I mean, these kids coming up are going to be, "Are you looking at this from
 670 your phone or a tablet? Oh, you're on a laptop." That's like saying, "800 by
 671 600," you know, like, "Oh, my gosh, do it for a notebook?" So the technology,
 672 they're going to have to pay attention to. Again, the media, today there are so
 673 many tools out there that can help people with graphics and things like that.
 674 People are expecting this rich media, this very pretty – because even if
 675 somebody wants to develop a web page anymore, there are so many tools for
 676 that out there that do so much for you, so people are expecting very engaging
 677 experience when they take a course. They don't want to just be told something;
 678 they want to be engaged and they want to interact with that course and things
 679 like that, and have decisions, "Okay, you do this. Now you have a practice.
 680 Okay, if you make this decision, then what happens?" So these decision trees,
 681 and there are some neat software... I personally like Articulate because it does
 682 a good job of quickly facilitating that, where you can have decisions. You say
 683 yes or no to this, then you go over here, and you can kind of design a tree,
 684 yeah, very quickly. The other thing too is learners will not waste time with a
 685 course. If it doesn't engage them, they're going to be out into the next thing or
 686 they'd find another way to learn it. It has to be engaging to them. They just
 687 don't have the time for it. And again, they definitely want to experience the
 688 simulations, interactions, rich media... again, some people don't like the term

- 689 but I think you have to consider a little bit of edutainment. You can trademark
690 that if you want.
- 691 Q18 What do you think an instructional designer should do in order to keep up
692 with this direction?
- 693 A18 I think the younger ones, this will come much easier for, or the ones that are
694 just kind of just coming out now. But folks that have been in the business a
695 little bit longer – don't stay in that comfort zone. They need to be able to get
696 out of that comfort zone. If they've done something a certain way, perhaps
697 they've been with one company for a period of time, they really need to look
698 and see what else is out there. Just do a Google search and find examples of
699 courses that you would like to take yourself, something that you say, "Wow,"
700 then I think you know you're on the right path. Kind of ask yourself... I think
701 ISDs today need to say, "Would I want to take that course? I know they have
702 to, but would I want to?" Because even if somebody has to take it, they'll go
703 through it, but is it really going to click, you know? Yeah, it's just kind of
704 information in, information out. So truly, I think ISDs today need to really
705 think about engaging the learner. So often, we focus on content, making sure
706 that they get this content, but really got to focus on that learner. What is that
707 learner? What can I do to them to really get this information to stick and to
708 make them want to learn? And if they're not younger, stay in touch with the
709 younger audience and find out from them, you know, what kind of things
710 would you like? What kind of things would make you want to take this
711 course? And again, I made a note here: Be ready, because in a couple of years,
712 everybody's going to be developing for tablets, I think. You will learn how to
713 design for tablets! It truly is so amazing, this time where we're at, because
714 people are finding ways to get information all over the place. Again, they're
715 learning from YouTube. They're going to websites, Google, so it's very
716 interesting. I think some people are missing the boat and they aren't changing
717 their skills, and I think those people are doing a disservice to their audience.
718 Yeah, it's funny because people – that made me think because you say
719 "social," but we talk less. I mean, with text message, you say, "How do I get
720 here? What do you think about this?" You know, companies where I'm at, we
721 have blogs and if you want to find out some information, you just look at the
722 blog real quick, "Oh, there's..." So all of that social informal learning, that's
723 absolutely where people get information. I think what you're going to find is
724 there's going to be more of an emphasis on structuring those and making sure
725 that there's somebody watching those boards, because if somebody posts
726 information, you need to have a governance body that's making sure that
727 information is appropriate and correct, so I kind of think that our business is
728 just changing so much and there are so many different facets of it. it's a great
729 time, and I think people that are nervous about that are just going to get passed
730 by. It's those that embrace all these different types of learning – you don't
731 have to be an expert but at least you have to be open to it. Exactly, be aware of
732 it. I do read often. There's a... I like Chief Learning Officer magazine,
733 because it... I have three children. I have a 10-month-old, so I don't have a lot
734 of time. I have a five-year-old, a three-year-old, and a 10-month-old. So for

- 735 me, when I go through a website or some of my journals, I mean, I'll just kind
 736 of pick and choose the things that I'm intrigued. And with that software that I
 737 mentioned, Articulate, there's a weekly email that they send out with some
 738 tips and tricks and things like that, that I... and some of it was specific to the
 739 software, but other was just basic ISD like, "Have you thought about doing
 740 this?" And it just kind of gives some ideas. So I kind of pick and choose here
 741 and there of the articles that I read. I was with the ISPI, but again in the last
 742 seven months, I haven't really kept up on that. I really should. I've been...
 743 with my new position, it's been very, very busy and – not overwhelming but
 744 close, so I need to kind of, you know... and talking about these things makes
 745 me realize that I've kind of missed that over the last six or seven months. I
 746 want to get back into those things because it is a little different what I'm doing
 747 now, and I'm very happy with the changes I've made. But, again, I don't want
 748 to lose those skills and things like that, and I think it's very important to be
 749 part of those. I'm pretty fortunate where I have some peers that I can kind of
 750 talk about that with and I have a training group that we're affiliated with, so
 751 they know my background. So once in a while, we'll talk training talk, you
 752 know. So that's kind of how I keep up on that. It really is great because they
 753 want us to do – just recently, they asked what seminars and things like that
 754 would we like to go to, so I need to go and find out what... because I haven't
 755 been to the consortium or any of those large events, but those are the kinds of
 756 things that I need to – or even smaller ones, you know... yeah, even the local
 757 ones. I've kind of been. Again, I kind of pick and choose and I'll read articles
 758 and things like that, but it probably would be... I do need to go in and actually
 759 be a part of them physically, you know, and not just... I need to get better at
 760 that, that's for sure.
- 761 Q19 Anything else that was not covered in our conversation but you think is
 762 important?
- 763 A19 I don't think so. I couldn't think of anything else. These were all really good
 764 questions and I hope that I got across some decent answers for you.

1

Transcription of Interview 014

- 2 Q1 Good Evening, thanks for taking time with me. Can you tell me your current
3 job title?
- 4 A1 You are welcome. Senior Instructional design consultant.
- 5 Q2 How long have you been working in the current position?
- 6 A2 Three months actually.
- 7 Q3 What's your age range: 25-35, 36-45, 46-55, and 56 above?
- 8 A3 36-45
- 9 Q4 Would you say you are actively involved in instructional design?
- 10 A4 Yes
- 11 Q5 Are there any other positions have you held before, that were related with
12 instructional design?
- 13 A5 I had a brief job right before I came to XXXX as director of employee
14 development, but honest it was more than an instructional designer job than a
15 director job, I was a director of myself. It was a very small department. And
16 then prior to that I was an instructional designer in a different company that
17 goes back to 2004. Instructional designer was my title.
- 18 Q6 How many years accumulatively do you estimate you have worked in
19 design/development for WBI?
- 20 A6 Ten years. In fact I was a Web based instructional designer before I was
21 actually an instructional designer.
- 22 Q7 In those WBI projects, how many years accumulatively do you estimate have
23 you served as a lead instruction designer/developer?
- 24 A7 I would consider a lead all those ten years.
- 25 Q8a What's the major of your bachelor's degree?
- 26 A8a My bachelor's degree... I had a major in telecommunication, such as
27 corporate video, minor in English and a minor in theater.
- 28 Q8b Did you have postgraduate education: Master's, or Ph.D.?(What's the major?)
- 29 A8b And my Master's is in Instructional Design.
- 30 Q8c Have you had any other training on instructional design?
- 31 A8c I haven't been to any professional workshops; my companies haven't had
32 enough to send me unfortunately. I do get to go to one this year, now that you
33 mention it, I am very excited.
- 34 Q9 What's the business nature of your current organization: business/industry,
35 education, government/military, and health care, independent, other?
- 36 A9 Health care.
- 37 Q10 What's the estimated size of the organization you are working for?
- 38 A10 Around 44000 employees right now, about 40 people in our training
39 department. We had two big groups merged into one, and that just happened
40 in November. Actually I got in the day before they merged, believe it or not.
- 41 Q11 Can you tell me a Web Based Instruction project you are very proud of or got
42 highly recognized?
- 43 A11 There are so many to choose from. All my projects are my babies. Why don't
44 I talk about one I won an award back in 2004? It was a blended learning type
45 solution. We had one element of it that was virtual instructed led training.

46 Then there was the second portion of it was self study via little online
 47 activities that we did for them. It was for a school system in England, which
 48 is really interesting, because instead of designing for adults I had to design for
 49 high school students, which was a bit more challenging that I ever expected,
 50 especially when they are in a virtual classroom type environment. We learned
 51 a little bit about those types of students. It was an extremely challenging
 52 project just because there was a blended learning solution with so many
 53 different elements to it. Trying to keep a ninth grader engaged was not easy.
 54 First of all, we designed some things that typically would work for an adult
 55 learner. We designed activities that would use the whiteboard, for example.
 56 We learned pretty quickly that you cannot use a whiteboard with ninth graders
 57 because there will be doodles and swear words and all sorts of things on that
 58 white board in five minutes. This was my prior employer. This was actually
 59 several years ago. We were basically the vendor and the school system was
 60 our external customer.

61 Q11a How many team members in the project?

62 A11a It started out as me. I was the lead instructional designer. I just wanted to
 63 give you kind of an idea of how long the curriculum was. We had eight
 64 courses and each of the eight courses was divided into forty modules. It was
 65 an absolute huge curriculum. I was the lead instructional designer on it. For a
 66 while, I was the only instructional designer. Eventually we brought on two
 67 more. We had a graphic designer who was awesome, because we did amazing
 68 things with graphics. We came up with really fun metaphors and ways of
 69 looking at things. Each of the modules had a theme that was age appropriate
 70 for the kids. Visually, this course was stunning. I love my graphic designer.
 71 Then we had a Flash programmer. The Flash programmer did most of the
 72 Flash development for this particular course. I did not do a lot of
 73 development on this course, which is interesting because I do tend to like to
 74 do the development. But on this particular curriculum, I don't think I did any.
 75 I maybe helped edit some of the online Flash activities. I was so busy
 76 designing and there was a textbook that went along with it. I was writing the
 77 textbook as well. We did not actually use any humans in the SME. Let me tell
 78 you why. It was because it was based on an approved curriculum, the
 79 European computer driver's license. It had nothing to do with driving. It had
 80 to do with computer literacy. But they publish basically a syllabus that has
 81 very stringent curriculum guidelines, very stringent objectives, and in order to
 82 get this certification – because they could take a test at the end of this and get
 83 the certification which was a fairly big deal in England, I believe, at the time.
 84 I suspect it still is. So we had to follow and prove that we met the criteria
 85 based on the syllabus. It was computer literacy, so we basically used
 86 modified from textbooks and from our own knowledge of Windows based
 87 programs. I would actually have to learn the program and then teach it.
 88 Actually, it turned out I was SME, and the textbook is the reference. I did not
 89 manage the whole project. We did have a project manager. He would do the
 90 oversight of the larger team. I was doing the oversight of the development
 91 team, so those two developers that I spoke about and the two instructional

- 92 designers I spoke about. I was the team lead for that. I wasn't there direct
 93 supervisor, but I led the team. I would report to him, but he also had other
 94 responsibilities like going out to England where were hosting this course and
 95 training instructors out there. Making sure that the testing sites were up and
 96 running, because there was certification. We had to run testing through
 97 outside testing sites.
- 98 Q11b How long did it last?
 99 A11b We started in April and I think it was the next February when we actually had
 100 the first running version of all the modules, and then of course we did
 101 revisions after that. So nine months from 2004 to 2005.
- 102 Q11c What was the project about, was it about how to complete a step, process, use
 103 systems, or how to perform physical jobs, or change attitude/value?
 104 A11c We definitely did ADDIE, because it was a unique project, it wasn't for a
 105 company – we weren't trying to solve a problem for a company. We were
 106 developing basically a product, a curriculum. It was a little bit adapted, so
 107 analysis in and of itself. We didn't do a lot of needs analysis upfront. We had
 108 the objectives. We had everything for us. We use that as a base. We went
 109 through the design, the high level outlines, a high level design document.
- 110 Q11di Describe the project in a very high level (the process by stages)
 111 A11di I did a high level design which basically outlined the topic and the types of
 112 activities that we were going to do during the class and their online practice
 113 activities and that type of thing, as well as we outlined – each of the courses
 114 had a theme. In addition to the design document, we sort of outlined a little
 115 bit of creative treatment, like the theme, so that went around that. The design
 116 document – and I've seen really, really detailed design documents, but it was
 117 not that detailed. It really just listed topics, the amount of time we thought it
 118 was going to take and the activity that went along with it. From that, we
 119 started to build the storyboard. We use Word. I built a couple storyboard
 120 templates because the company that I was working on did not have them. We
 121 did a couple of iterations in PowerPoint and we did a couple of them in Word,
 122 and the designers fought for the ones that they wanted to most. I actually
 123 preferred the PowerPoint, but I think we ended up doing it in Word. So we
 124 went through the storyboard process. The review cycle, since we did not have
 125 a client or a client team to review, it was pretty much peer reviewed by other
 126 designers. The designers that I had working for me, say they were like
 127 freelancer or the other ones that we had on staff, I would review the design
 128 documents and the storyboards. If it was mine my boss would review them.
 129 He was the one who signed up the content. After the review of the storyboard
 130 I would go and of course make the changes. Then I would hand that off to my
 131 development team that we worked very closely hand and hand. My Flash
 132 developer and my graphic artist are extremely talented and creative people.
 133 They would take a lot of what I had written and they would take it even
 134 further. They would actually come up with a lot of their own ideas and how
 135 to make some of my things even better, which is something that I don't
 136 always get in some of the teams that I work with. Some people just want to
 137 take what you give them and do it exactly as you say. We really were a

138 collaborative and creative team and it was really fun. From there, we would
 139 develop the course. We had the virtual instructor led training, so we would
 140 build the slides for that course and then they would build the online activities.
 141 Then we did a pilot and I wasn't there for the pilot. It was in England. We
 142 did that after the first course was in Excel, either Excel or Word. It was one
 143 of the two. That's when we started to learn that some of the design elements
 144 that we had put together, like I had told you before, using the whiteboard or
 145 using app share to show them different things in Excel wasn't going to work
 146 for our environment because in a lot of places and in a lot of the schools, they
 147 had the computer programs locked down. After the pilot we really had to go
 148 and revamp some of the way we designed it, especially the first couple of
 149 modules we did a redesign before we went live in the classroom. After that
 150 point a lot of things overlap each other, so we are doing the redesign for a
 151 couple of the course while we're designing the remainder of the curriculum,
 152 the next semester's curriculum. We seemed to always be maybe six weeks
 153 ahead of the teachers. I think I told you it ended in February, so you think of
 154 it like it was a school year. There were two semesters, so we ended in
 155 February of the school year and it ended in June. We were right behind them,
 156 and leading them as we were done. I still think this particular project is being
 157 done live in the schools. I'm not quite sure how many iterations they have
 158 done at this point. But this was the first year. So design development,
 159 implementation – again, I wasn't really involved with implementation as
 160 much as the project manager was. He was the one that was going out to
 161 England and meeting with the instructors, meeting with the schools.
 162 Evaluation, like I said we did a pilot. We had our little smiley sheets. We did
 163 a lot of validation of the tests, because that was required for the curriculum.
 164 We worked with people. We wrote the first version of the exam and then we
 165 worked with the testing center to do analysis of the exam for validity and
 166 reliability, and also that it met the requirements of the program. Evaluation
 167 was really interesting because the end result we wanted these kids to pass their
 168 certification exam. We did that item analysis which was really telling to see
 169 where the program was weak, where they needed more practice, and which
 170 things we needed to beef up. That was part of the redesign, as well. I do not
 171 remember the results. It was really long ago. I remember some of the
 172 modules were really high. Some of the modules were a little bit tougher. But
 173 I don't remember what those results were. It was a really revolutionary way
 174 to deliver learning at the time. I think that's one of the reasons why we won
 175 the award. At the time, first of all virtual instructor led was not being done
 176 that way, and it certainly wasn't being done in a high school. The name of the
 177 reward, I think was called the Rolla award. You probably haven't heard of it
 178 because it's in England. It was for blended learning design. It was on par
 179 with an ASTD award or something like that. It's a pretty big award. Again, I
 180 didn't get to go to England to accept it either.

181 Q11dii Describe the project in as much low level (steps, tasks) as possible

182 A11dii It was a long time ago. I try to get as detailed as I could. We were a small
 183 tight nit team, so there weren't so really a lot of client meetings that we

184 needed to document and those types of things. It was really about a team
 185 working organically together to create a product. Like I said, when it comes
 186 to the storyboard phase, those are the things that I'm remembering the most
 187 because there was a lot of debate on which storyboard version that we were
 188 going to end up using for the rest of the project. There was also some
 189 difficulty once we started doing revisions and how to communicate the
 190 revisions to the development team. Now I just remembered something. You
 191 were talking about SMEs earlier, but not that you made me start to think about
 192 forums and this type of thing, we did have SMEs out in England who were
 193 certified in this ECDL training. They were certified instructors. They were
 194 certified to teach the curriculum. We did have them review the storyboards
 195 before we developed them, and we did have them review them afterwards.
 196 The review process was probably what you're used to. If you don't give them
 197 a form to use, they are just going to give it to you. We had to create all these
 198 forms from scratch, or I had to create all these forms from scratch because
 199 they – I was the first instructional designer this company had ever hired. I
 200 was fresh out of school. I had done some contract work, but this was my first
 201 instructional design job. I'm kind of making it all up as I go along. The
 202 starting is kind of a funny story. I don't know if it's going to help your
 203 research at all, but I was doing contract work with one of my professors for
 204 this company and he had recommended me to another person. So they called
 205 and I interviewed with them. I liked them. They liked me, and I was excited.
 206 Actually, I wasn't even done with my Master's yet. The first couple of months
 207 I was doing my final project, as well. I'm squatting in this office which
 208 turned out to be the president's office. He just wasn't there that day. He
 209 happened to come in. This was like my first day. He was like, "So did
 210 anyone tell you about this ECDL training we want you to do?" I'm like, "Oh,
 211 they've told me a little bit about that." Then he was like, "Did you know we
 212 have to have the first course done in six weeks?" I said, "What!" Remember,
 213 I am like fresh out of school. This was my first real job and I'm the only
 214 instructional designer on the team. So I'm like holy crap, can I even do this?
 215 Do I even know what I'm doing? The first thing I did was to get a copy of the
 216 syllabus. They had a copy of this thing. It was a 20 page document, but it
 217 was 8 point font and it was just an outline of all the topics that you need to do.
 218 It was actually quite daunting. They gave me a book and I said to my boss,
 219 "What do you want me to do first?" He was like, "Start the design document
 220 for module one." This was the guidance I was given. I didn't have to do a
 221 task analysis. Everything was pretty much handed to me, which was like I
 222 said it was light on analysis. I didn't have to do that type of thing. The way
 223 we decided to teach it and the approach we took and the order that we decided
 224 to teach it in, these were all decisions that me and the team made. But we
 225 could teach it and design it and show it in any way that we could. We just had
 226 to make sure that these 1,050 topics were covered. I was designing for a good
 227 nine months solid. But that was either a new module or a revision of an old
 228 module. So I could be doing a design document for one module, a storyboard
 229 on another, while they are doing development and then also managing the

230 evaluation. This particular team was very informal. We had like a little cue
 231 bank, so the developmental team actually sat in a little pod. It made
 232 communication really easy. As for the tracking, we had an Excel spreadsheet
 233 that we had worked with. It sort of bypassed project. The project manager
 234 put this together. We would talk as a team to update this. He had all the
 235 modules and all the moving parts in his Excel spreadsheet and he would keep
 236 track of tasks in the spreadsheet. I don't think he tracked the number of hours
 237 we were spending on it or that type of thing. As long as it was getting done
 238 and it was getting done on time, he was fine. We didn't have any deadlines, it
 239 all has to be done by this day, but we did know the instructors are teaching
 240 and this is their schedule for this semester. Each semester we would get the
 241 schedule, so that arbitrarily gave us our deadlines. They start teaching on
 242 September 1st, so we have to have the first four weeks done by that date. We
 243 tried to stay at least a month ahead of schedule. One to three months ahead,
 244 but sometimes some of the more difficult modules took a little bit longer. The
 245 Access course in particular was a bit of a bear. There was no project plan for
 246 this. Project Manager's Excel spreadsheet was the plan. It certainly wasn't
 247 presented to me before I started working on it. I didn't have to worry about
 248 budget. It wasn't the type of company that put a bill rate to your hours. We
 249 certainly put a lot of overtime in on this project. I think overtime work was
 250 expected. Honestly, it was probably a little bit of both being self-imposed and
 251 expected. This was a pretty enjoyable experience for me. I was single at the
 252 time and much younger at the time, so I enjoyed putting the hours in on the
 253 project. It was a lot of self-imposed overtime. But it was also a little expected
 254 because you had to make the deadline. I mean you can't have the instructor
 255 leading a class with no material. It was only me to begin with. Then, yeah,
 256 they did get probably a little bit more money. I don't know what was going
 257 on with the budget at the time. I think there were a lot of wealthy people who
 258 wanted to make the investment in this. This was a product they were building
 259 and so they were investing in it. They were kind of throwing a little bit of
 260 money at it, like I said, not a typical project in that sense. It wasn't a one
 261 person project. I was glad to have the other people working on it too. Plus,
 262 being such a new instructional designer, I really liked to get the chance to
 263 learn from other people too. They did put some more seeds into people on the
 264 team eventually. As for the other two designers, the one designer had several
 265 years of experience, actually. The other one, he was a contractor. He also had
 266 several years of experience. His stuff needed a lot of revision. So even
 267 though he had quite a bit of experience, it needed quite a bit of revision. He
 268 was the kind of designer who doesn't think less is more, he thinks more is
 269 more. So at first, it's got to be a 45 minute class. We got to get rid of a lot of
 270 material. He had some great ideas, but it was too much. It definitely needed
 271 to be cut down for the timeframe. He wasn't actually offended. The other
 272 gentleman that they had on staff was much more seasoned and I didn't have to
 273 revise his work as much as the contractor. But I think he probably would have
 274 been offended if this young lady with six month experience critiques his work.
 275 He took some constructive criticism. His work didn't need to be edited as

- 276 much as the other person's did. I learned a lot from him actually. My Project
 277 Manager trusted me. I think I did make a good impression on him. To this
 278 day – and this project was eight years ago – he was like, “I don't know where
 279 I would have been if I didn't have you on that project.” That's a compliment.
- 280 Q11diii What event/communication marked the beginning of the project?
 281 A11diii (Answered above)
- 282 Q11div What event/communication indicated the completion of the project?
 283 A11div They still might be working on it now. I don't know. Certainly at the end of
 284 the school year and when we completed all of that was like – you can consider
 285 that the end. At that point, it was revisions and getting ready for the next
 286 school year. You can say the last day of school.
- 287 Q11dv What was your role in the project?
 288 A11dv Like I said, I was responsible for designing and coming up with the theme of
 289 the courses in each of the modules. I was responsible for doing all of the
 290 storyboarding which included all of the scripting and all of the writing of the
 291 course. It wasn't a fully scripted course, since it was instructor led.
 292 Interestingly enough, we did not join an instructor guide for this course. I
 293 don't know why we did that. They said, “We don't need that. We don't need
 294 that.” So I'm like, “Okay, we don't need that.” I don't know why we didn't
 295 do that. He kept saying, “These people are ECDL certified, they should know
 296 this stuff.” We had some really crazy metaphors and we would do slides like
 297 the topic would be like columns and rows in Excel. We would create these
 298 graphics that would show conceptual, kind of crazy columns and rows. So we
 299 would have a crew team rowing across a lake in front of the Parthenon with
 300 the columns. We would do things like that all the time. I hope kids like that .
 301 We just did all sorts of fun stuff like that. We did one on the Access course, it
 302 was building your own jukebox, we did little slash things that they could click
 303 on during class on their screen while the screen is actually leading it and it
 304 would give them a little fact about music or something like that. So we
 305 designed some pretty creative elements even though it was virtual instructor
 306 led, that they could actually interact with the sites themselves. I'm telling you
 307 what I did. I did the storyboarding. I wrote what they called a study guide,
 308 but basically it was textbook for an accompanying principal textbook for each
 309 of the modules with the screenshots and steps to do certain things and any of
 310 the concepts that they need to learn, glossary, so they could print it out. I
 311 designed the learning activities, I think I mentioned. The textbook and all of
 312 the online learning activities were part of a learning center, so we designed the
 313 learning center that they could go into after class. Each module would have
 314 practice sessions. So they would either – we tried to use Captivate at the time
 315 for some of these, but I don't know if it was because the machines were using
 316 were so old and Captivate was so new at the time. We had some problems.
 317 We ended up doing these all in Flash, like the little try it and show me. They
 318 were a little bit more fun than a typical try it and show me. We did puzzles
 319 and some really fun activities that I designed and the developer developed.
 320 We put that in the learning center. I was leading all of the changes, ongoing
 321 changes, from the SMEs and logging those and managing the team to create

322 those changes. I worked with the team to come up with creative graphics. I
 323 would come up with the metaphors typically. If someone else had a good idea
 324 then we would incorporate it. Typically, I would come up with the metaphor
 325 and the graphic designer would take that metaphor and do something with it.
 326 What she ended up doing which was interesting is we would purchase images
 327 from ClipArt.com. She would take them and she would manipulate them and
 328 make them something completely different. I don't think there was one
 329 graphic that we just purchased from iStock or Dreamtime or ClipArt and put it
 330 in there. She took everything and she created something out of it. It was good
 331 stuff. The one learning activity that I can think of is we did one – it was sort of
 332 a try- it -and -show -me. It was for the class on how to use the Internet. It
 333 was simply how to download a song from the Internet. So that was one of the
 334 types of things that we did, but we used popular songs at the time. It was like
 335 a Captivate would have been, but we pretty much created it using screenshots
 336 and manipulated types of things. We took lots of screenshots. We had one
 337 computer that was just there for screenshots and basically had to build. Since
 338 the activities they were doing were built off one another, the screenshots had
 339 to be taken in sequential order. We basically had to use a computer that didn't
 340 have any other files on it except for what we were building. If we had to take
 341 one out of order, we would have to change the screenshot. It was like you
 342 were building a folder structure, you can't have something there that wasn't
 343 there before, so we needed basically a continuity editor. So that was the show
 344 me and try it for downloading a song or for adding a column or a row in Excel
 345 or using certain functions and words. We had those standards of show- me -
 346 and try -it. From the activities, we used it for to test vocabulary, we had some
 347 crossword puzzles in there that Flash base crossword puzzles. We would drag
 348 and drop exercises. We had some pretty fun things in there, just little games
 349 and things like that. We would design little things like self-study part that
 350 were intended. Some of them were intended to be done during the session.
 351 So the instructor would teach and then they would give them a chance to
 352 practice or to do the little activity, so we put them in there. We had a
 353 problem, though, because as I mentioned a lot of the computers while classes
 354 were going were locked down. Some of the classes that had less strict
 355 security guidelines got to do some of those during class, but a lot of them were
 356 assigned as homework where they could do them at home or when they
 357 opened them back up again. That was something that they had to do. That
 358 was a constraint that we didn't know going on starting the project that we had
 359 to deal with and we had to adapt afterwards. We had to get creative. To
 360 attract their attention, like I said, each of the courses had a different theme and
 361 a metaphor. One that I remember offhand that I thought worked really well
 362 was the database course that we did. Because we had them build an online
 363 jukebox as their database. So I think kids really relate to music. I got to do a
 364 lot of research on new bands and listen to their music. We incorporated a lot
 365 of themes that would keep them engaged. The course would start with a
 366 current song at the time. It would be playing in the background, so that would
 367 keep their attention. They would interfere at the beginning, like when they are

- 368 doing checks and making attendance, just all the little housekeeping things
 369 that you need to do while you're at the very beginning of a web session. They
 370 were all 45 minutes long like regular classes.
- 371 Q11dvi What software and services were used?
 372 A11dvi This project was a long time ago so a lot has changed. We used Captivate.
 373 We abandoned Captivate. I use Captivate now and I certainly don't have the
 374 problems that we had back then. We had some problems. We used a lot of
 375 Flash. The tool that we had used for delivery the online sessions was sort of a
 376 product of the company. It was called GGGGG. It was similar to a WebEx
 377 type of session, WebEx type of software. For graphics we used Fireworks and
 378 Photoshop. I'm sure we used Dreamweaver, because we needed to build web
 379 pages. I'm trying to remember if we actually had this. We had this in the
 380 LMS, and the LMS that we used was TTTT. It was TTTT. As for questions,
 381 we used Perception Question Mark. I think we used that for testing and
 382 surveys. We did do evaluations. I don't think we did them after every
 383 session. I'm trying to remember how often we did them. Kids are not as good
 384 about filling out those types of forms as adults are. The feedback we got is
 385 better enough when it's adults. You don't really get that great of feedback or
 386 you can't do that much with the feedback. It was worse with the kids. They
 387 are not used to filling out those sheets after their normal classes, either. It's
 388 about like every class in high school. You evaluate your instruction. I think I
 389 must have designed the survey questions. Many softwares like Great Point
 390 Live. You would say web software or something like that.
- 391 Q11dvii What hardware and devices were used?
 392 A11dvii Not that I can think of. We didn't do any recording for this particular course.
 393 We really needed the computer to capture things. I think we did use another
 394 program or software for screenshots. I think we used SnagIt. Hardware is
 395 now pretty much, the computers for it – interestingly enough, one of our
 396 instructors was blind. He had a lot of interesting hardware, but I don't think
 397 that is probably relevant to your research. He used it, but we certainly didn't
 398 need it for the project. He was legally blind. He could see a little bit. Instead
 399 of like a normal computer screen, he basically used like a huge flat screen TV
 400 as his monitor. For certain things, he had text readers. He does pretty well,
 401 because he was Skyping with me nonstop there for a couple of months. Every
 402 once and awhile I will still get a Skype from him. He somehow gets around.
 403 We actually used Skype a lot for this project, and this was back when Skype
 404 was a baby. I could write to him, too. If he got it big enough, he could see
 405 enough with his glasses and his huge, huge monitor that is still bigger than my
 406 TV to actually see it. I never actually noticed an impact honestly. He did kind
 407 of clue me in to certain things that I didn't know about, like not using certain
 408 colors for directions, making sure that there is contrast between lines. No one
 409 else had mentioned these things before. "Why can't I make my instructions in
 410 green? Why not?" He taught me a lot about accessibility that I don't think I
 411 would have gotten otherwise.
- 412 Q11e What were the outstanding features of this project?

- 413 A11e I think it was just really innovated at the time. I think the learning center that
 414 we put together would be activities. I think those were really, really well
 415 done. I think users were really, really pleased with it. I would like to know if
 416 they continued with it. They were really happy with it. It's not like
 417 something they purchased; this was something that was provided to them as a
 418 necessary service. I think they were really happy about it. People were
 419 thrilled about the award. We got a lot of great feedback on that. As far as end
 420 users, they were kids. I think they were less bored than they were in a normal
 421 classroom. If that's the case, I think we are just happy with that. I cannot
 422 think of anything more.
- 423 Q11f Did it occur to you that you wish to have done the project differently?
- 424 A11f The whole thing was a learning experience for me. Things that I learned the
 425 hard way were I think like to find a way to communicate changes to the
 426 development team for online courses in particular. I have worked for a lot of
 427 companies and I think that's – it leaves a lot of room for ambiguity. You have
 428 to find a really good and efficient way to do that. Some people like to write
 429 them on a piece of paper and give them to you. Other people are good with a
 430 spreadsheet. One of these days I really want to talk to someone who has
 431 perfected the process of change control. That did not go very well. I would
 432 have done that differently. Changes like when we were running the course we
 433 did the pilot or the SME would come back and say, "I don't like this slide. I
 434 would like it to say this instead of that." I know my developers didn't like to
 435 hear that. They took it very personally, but they would not get mad at the
 436 person who was doing the review. They would get mad at me, or they thought
 437 because I was the one who was communicating the change log to them that I
 438 was the one who was instigating the change.
- 439 Q11g What were the solution(s) to the challenge(s)?
- 440 A11g I still think my graphics designer to this day thinks I just added changes to that
 441 change log to make our life harder. But I would have to take things and I
 442 would have to interpret the SMEs comments or the reviewer's comments and
 443 translate them for everyone else and consolidate the feedback, make it very
 444 clear what change needed to be made. It's not always an easy job to do. I
 445 spent a lot more time with the change logs. When I first started doing it I
 446 would say, "Okay, the change log came in. Here is the change log." That was
 447 a disaster. I spent more time on consolidating it and putting it into language
 448 that the developers might understand. Sometimes just little pep talks, "Don't
 449 take it personally." Things like that. But I think we're all under a lot of
 450 pressure. Changes are more work. Because we were working on so many
 451 different parts at the same time, it was hard to keep things straight. We had the
 452 schedule – we had the class schedule – so pretty much the next session that
 453 was going to happen we would make that the priority. It was based on the day
 454 that they were going to teach. When we were doing the changes usually there
 455 were two courses/classes that had already been done, so those took a little less
 456 priority depending on which stage they were in the changes.
- 457 Q12a What specific knowledge, concepts, and ideas that helped you?

- 458 A12a I think it comes down to Lum Tech Autonomy, honestly. I was coming
 459 straight out of school, so using Lum Tech Autonomy, using that to develop
 460 learning. I didn't have to develop the objectives, but I did use that to structure
 461 some of my learning activities. I definitely use that. I still use that. My
 462 husband is going back to school to teach and he brought a book home on Lum
 463 Tech's Autonomy and I laughed really hard. Like, "You will use this." He
 464 was like, "No, I won't" "Well then, I will use it." From knowledge of
 465 message design definitely I am cognitive load. I'm trying to base these
 466 cognitiveload principals since this was a very visual course. Knowing
 467 chunking and pacing, I know that's really not any type of theory, but it is a
 468 skill and it is important. I don't think I could shift a lot, because I really never
 469 had any K-12 experience. I shifted a little bit trying to make things at a
 470 quicker pace more visually exciting than I would have in a course for adult
 471 learners, less discussion time and a lot more lecture time from the teacher. In
 472 this particular format using like didactic questioning doesn't really work. Just
 473 pretty much quicker pace, more visual, and a little more demonstration and
 474 practice during the class time.
- 475 Q12b What soft skills did you use?
- 476 A12b Negotiating skills with my development team and those review cycles.
 477 Basically, when can you get it done or negotiating skills also maybe with
 478 SMEs, like, "Okay, we can't do that, but how about if we make this change
 479 instead?" Negotiating skills, communication skills within the team.
 480 Definitely personality is there. One of my developers was a bit of a control
 481 freak. Communication skills on trying to loosen them up and work on a team
 482 in a team environment, instead of being a one man show. One thing I didn't
 483 mention that I think is just almost the number one thing for an instructional
 484 designer is just basic writing skills. You wouldn't think it but I know a lot of
 485 instructional designers and people who have gone through programs and got
 486 straight A's, undergraduate studies and things like that, but they are just not
 487 good compelling writers. They eventually took jobs on performance
 488 consulting and not in instructional design. I think that's something that's
 489 extremely important for an instructional designer, is writing skills. Teaching
 490 myself how to write for an 8th grade audience, no matter what the audience,
 491 was something that was very hard for me in the very beginning, to write
 492 things that are clear. Even if you are working with adults – I mean you know
 493 this – you want to write at a lower level. Teaching myself to write at a lower
 494 level was difficult, I think. It is critical to being an instructional designer. I
 495 think I'm still perfecting that skill. I think back to the project that – are you
 496 still there? I think when I first started working on the project – that was one
 497 of the first projects I ever worked on. I would be really frustrated if someone
 498 read something that I wrote and it wasn't clear. I would be very frustrated.
 499 But I have learned and I have started to learn that the things that people read
 500 that they have trouble with, and I have adapted my writing style to that. One
 501 of the soft skills that an instructional designer needs to have is sort of a thick
 502 skin. Because it's hard because you create something and its tangible and
 503 people can look at it and review it, and in order for it to become better you

- 504 have to put it out there for people to review, critique and change. That's really
 505 the only way to make it better. Sometimes that can be a very hard thing to do,
 506 especially when you're young and that used to that type of thing.
- 507 Q12c What hard skills did you use?
 508 A12d I certainly think it helps instructional designers even if they don't have
 509 development skills in Flash or things like Articulate or Captivate or Lectora or
 510 any of the number of programs people use to create eLearning. Even if you
 511 don't feel like you have the desire or the capacity to learn these programs, I
 512 think it is important to know them at a fundamental level so you can design
 513 interactions and you can design learning that your tools can do. I usually
 514 specify the graphics. That's because I particularly like – I think part of
 515 instructional design is designing the page, as well, because people learn by the
 516 visual as well as the narrative. I know a lot of instructional designers fight me
 517 on this and just say, "Let the graphic designer do the job," or "Let the
 518 developer do their job." But sometimes I have worked with developers who
 519 are really good at that, and I have worked with developers who will just do
 520 exactly what is on the storyboard. If you are doing a storyboard in Word
 521 where you really can't manipulate a graphic and place it exactly where you
 522 want it, it sometimes is difficult. I do adapt my storyboards based on who is
 523 developing them, so sometimes I will write exactly what I want. Sometimes I
 524 will give them exactly what I want. But some graphic designers or developers
 525 that I know really have a grasp on instructional design and thinking about
 526 learning and how to design the page to facilitate learning. I will let them have
 527 more free reign. Key software for eLearning, like Word, which are sort of the
 528 basic things but you can use it for quite a bit, PowerPoint, definitely. I really
 529 do like designing in PowerPoint. Visio is helpful. I know there are some
 530 mind mapping software out there that people like to use, as well, but it is just
 531 like a fun thing. I think Microsoft Project and Excel are good if you are doing
 532 any type of project management along with your instructional design. Of
 533 course, it depends on your function. Basically you could be an instructional
 534 designer and know Word and nothing else. It helps to know other things. I
 535 know I like to do a lot of my own development. I think Articulate is great.
 536 Captivate is really great for an instructional designer that doesn't know a lot
 537 of Flash or programming. Those are great, great tools except for the whole
 538 Flash output thing. It's difficult because instructional designers and
 539 developers, that keeping up with technology is so critical. It's always
 540 changing. People are using Articulate but now that we are using more mobile
 541 devices that don't support Flash, we have to rethink these things, so you got to
 542 keep up with these things. Even if you are not doing the development, like I
 543 said, just so you can design things that are going to be successful, to utilize the
 544 best features of each of the tools that you are developing in.
- 545 Q12d What attitude did you realize that was helpful for the success of this project?
 546 A12d You have to be comfortable with ambiguity and change. I think that's critical.
 547 I think if you're comfortable with ambiguity and change that helps you have a
 548 more positive attitude in designing. Because when you are designing your
 549 project you are starting with something big and abstract. Every project that I

550 have worked on is big and abstract at the very beginning. I always say that I
 551 like to create – I’m really good at creating order out of chaos. I think that’s
 552 part of our jobs, you know, to take those abstract ideas and create something
 553 tangible that is going to produce behavior change and produce results. Be
 554 comfortable with chaos but strive for that order. I think I am organized. I kind
 555 of go back and forth with process, with the ADDIE process or with process in
 556 particular. You need to know when you need to follow process and you need
 557 to know when it’s okay to go a little off track, in order to make your project
 558 successful. That’s adaptability, so you need to be organized but you need to
 559 be adaptable, as well. Don’t be so married into your processes and your
 560 documentations that you miss the bigger picture.

561 Q13 Which year was the project? What do you wish to have known that you didn’t
 562 know back then?

563 A13 It was 2004. We talked about a good way to do changes. For that project that
 564 was the biggest pain point, so that’s certainly something I wish I had known
 565 how to do better. Yeah, manage the change control process. I certainly used
 566 techniques over the years that could have helped me on that project. That
 567 project, because it wasn’t just a normal web based course. It doesn’t have
 568 some of the nuances as some of the courses I work on now. I remember one
 569 of the first true web based course that I worked on was Audio. I had no idea
 570 how boring a slide would be with a minute and a half with audio and only two
 571 visuals. I wish I would have known at that time, first starting out, a magic
 572 formula of how many times you have to change graphics based on the amount
 573 of audio. I’m still not very good at judging the length of audio based on the
 574 length of my scripts. I’m getting much better at that, but I wish someone
 575 would have told me that a thousand words of audios equal this amount of
 576 spoken text or something like that. I wish I would have been better prepared
 577 for some of the ways we got off track, because I designed something for a
 578 technology in the class room that didn’t work or I couldn’t do. Researching
 579 technical specifications was something that I never really considered.
 580 Someone gave me a list of text and I said, “Okay, that’s going to work for
 581 everybody,” and it didn’t. So knowing to now trust technology and always
 582 have a backup plan. What I was talking about was when I designed some
 583 whiteboard activities or when we designed the practice activities that were
 584 supposed to be done during class, and then we found out that we couldn’t
 585 launch them or we had to disable the whiteboard because they were so
 586 behaved.

587 Q14 What are the other knowledge, skills or attitude which was not used in the
 588 above project but you used in other Web Based Instruction projects you led?

589 A14 I think creativity. I’m sure you have gotten that a lot. Being able to design
 590 for each of the different modes of learning, design for visual learners,
 591 designing for hearing based learners or tactile learners and even if you don’t
 592 learn that particular way. I think knowing a little bit about graphic design
 593 helps. I think knowing a little bit of development always helps and positive
 594 attitude helps too. There are so many ways to describe a positive attitude, but
 595 you have to be able to both work in a team and also be able to work very

596 independently, if you have to. It is just like when you are running through the
 597 cycles, when you are in analysis phase, you need to really be listening and
 598 watching and paying attention to the people around you and what they're
 599 doing and really absorbing and grasping everything. In the design phase, you
 600 have to sit in a room and write. But once you get to implementation or
 601 development, then breeding and managing and leadership skills kick in a little
 602 bit more, consulting skills. A lot of clients – and not on this project, but with
 603 clients that I have had since then – they don't understand what the process is
 604 or why we go through it, so educating them and consulting them, using those
 605 consultative skills are important for most instructional designers as well.

606 Q15 Assuming you are hiring a person as a beginning instructional designer in
 607 Web Based Instruction, what skills are you expecting?

608 A15 I would expect them to have some educational background in instructional
 609 design. It doesn't need to be a Master's. It could be a different field, but I
 610 would expect them to be able to know what ADDIE is. They need to have
 611 good writing skills. That's critical. I definitely would want to see writing
 612 samples, a portfolio, if they had it. And this how I can always tell after
 613 working with a lot of contractors if an instructional designer is going to work
 614 out or not. You need to be able to write an objective. That's a basic but a lot
 615 of people that are out there calling themselves instructional designers and they
 616 cannot write an objective.

617 Q16 Assuming you are hiring a person as an experienced instructional designer in
 618 Web Based Instruction, what skills are you expecting?

619 A16 If someone was coming out of school right now honestly I would expect them
 620 to have some development skills. For a web based instructional designer role,
 621 I would expect them to know something, whether that's Articulate or
 622 Captivate or Flash. I would expect them to have some graphic capabilities.
 623 Some of the older instructional designers don't have that, nor do I expect them
 624 to, but if it was someone fresh out of school I would expect that. I would
 625 define someone as an expert if they had worked on several different types of
 626 projects and not just one smaller project or standup solutions, maybe some
 627 instructor led standup solutions as well. I think as an instructional designer,
 628 even if it is just for web based, you are always expected to do a little bit of
 629 everything. They also need to have really good analysis skills and know what
 630 it takes to get a project implemented. If they can't do it on their own, at least
 631 they know the correct questions to ask. I think for a seasoned instructional
 632 designer, knowing that they have some consultative experience or experience
 633 working with clients. I'm not caught up on whether they have a master's or
 634 not. But again, I would expect them to have education in a related field and
 635 more experience in instructional design.

636 Q17 Which direction do you see Web Based Instruction is heading to?

637 A17 Oh, that's a good question. Mobile learning is definitely one. That's certainly
 638 what I think of when I think of the future. I really do like the concept of the
 639 social learning community. I'm not quite sure if it's going to take, but I
 640 would like to see it take. If social learning communities and things like that
 641 do start to become more of a trend and people start using them more, I do see

- 642 more informal learning opportunities and more collaborative instructional
 643 design. Less on us and more on them, so designing learning that uses the
 644 learner as the SME, so to speak, if that makes any sense. We might be
 645 teaching things how to use YouTube more often than do design document, I
 646 don't know. Definitely with technology we are going to be able to do a lot
 647 more video. I think there are courses out there that do a good job of online
 648 learning for soft skills, but a lot of it doesn't. I think in the future we are just
 649 going to get better and better and better at that, with the technology of
 650 teaching soft skills. The more bandwidth we have the more we can do with it.
- 651 Q18 What do you think an instructional designer should do in order to keep up
 652 with this direction?
- 653 A18 I am always on forums. I think at this point if you are going to keep up with
 654 technology in the field, that's probably the best way to be, whether that's your
 655 LinkedIn group or the Articulate user community or the Captivate
 656 communities. Those are great places to start. Conferences, like I've heard
 657 really great things about the where people can talk, but you can't do that every
 658 day. Online forums, I mean there are ASTD and ISPI. We are missing that
 659 ISPI meeting tonight, by the way. I have been at one point in time or another,
 660 a member of ASTD or ISPI. I am not an individual member right now, but
 661 now that I'm at YYYY, I can go to the events on a group membership. I tend
 662 to go when I like the topic. I haven't had the chance to go the national
 663 conference, but perhaps I will go this year. I have to decide on which
 664 conference I want to go to. I was tasked with that today, to decide which
 665 conference I want to go to this year. So I have to figure it out. My department
 666 is going to pay for it. I probably am just going to go.
- 667 Q19 Anything else that was not covered in our conversation but you think is
 668 important?
- 669 A19 I can't think of anything offhand. We covered quite a bit today.

1

Transcription of Interview 015

- 2 Q1 Good Evening, thanks for taking time with me. Can you tell me your current
3 job title?
- 4 A1 No problem, I think I am calling learning developer
- 5 Q2 How long have you been working in the current position?
- 6 A2 6 weeks
- 7 Q3 What's your age range: 25-35, 36-45, 46-55, and 56 above?
- 8 A3 36-45
- 9 Q4 Would you say you are actively involved in instructional design?
- 10 A4 Oh yes
- 11 Q5 Are there any other positions you have you held before, that were related with
12 instructional design?
- 13 A5 Before this, I worked as an instructional designer at XXXX, I worked there
14 for two years. And before that, I worked at YYYY roughly a little bit over two
15 years and they call me performance improvement specialist, but I did
16 exclusively eLearning development. And I contracted with a company before
17 that, and that was about a year. Before that I was a POS, which means Point of
18 Sales and I developed all web instructional design work and I did that for
19 about two years. How far do you want me to go back? Ten
20 years...Experience? No, TP, that was B2B member exchange, and I did all
21 their instructional design and delivery, and I did that for about three years. I
22 just moved around a lot.
- 23 Q6 How many years accumulatively do you estimate you have worked in
24 design/development for WBI?
- 25 A6 Eight years
- 26 Q7 In those WBI projects, how many years accumulatively do you estimate you
27 have served as a lead instruction designer/developer?
- 28 A7 Eight. To be honest, up to six weeks ago, I have always been team member
29 one.
- 30 Q8a What's the major of your bachelor's degree?
- 31 A8a I have a bachelor's degree in biology
- 32 Q8b Did you have postgraduate education: Master's, or Ph.D.?
- 33 A8b I have a Master's degree in Training and Development with emphasis in
34 Instructional Design.
- 35 Q8c Have you had any other training on instructional design?
- 36 A8c Random certificate courses, in-depth learning. you know, took a certificate
37 based course, Captivate course, stuff like that. I can't tell you all that. I went
38 to courses and workshops all the time.
- 39 Q9 What's the business nature of your current organization: business/industry,
40 education, government/military, health care, independent, other?
- 41 A9 Manufactory (business/industry)
- 42 Q10 What's the estimated size of the organization you are working for?
- 43 A10 They keep growing, I would say about 5,000 employees. It is global. It is five
44 people in the training group, including the training manager and coordinator.

- 45 Q11 Can you tell me a Web Based Instruction project you are very proud of or got
46 highly recognized?
- 47 A11 I would have to pick, first, the inception of an eLearning program at XXXX.
48 They brought me in specifically to take their paper instruction methodology
49 and move it to online. I had to redo it from the ground up. The last time the
50 paper based materials were updated was 2004. It was very old and challenging.
- 51 Q11a How many team members in the project?
- 52 A11a It varied from module to module. I would say, at any given time, three to
53 eight people per module. It could be legal. It could have been a product SME.
54 It could have been an operation SME. That's a hard question to answer. At
55 any given point in time it could have been anyone. Just me as the designer and
56 developer. That would be the reason why I left the company. They burned
57 me out. I got real tired. I did everything, voiceovers, everything.
- 58 Q11b How long did it last?
- 59 A11b Just the crew training... that could probably 14 months.
- 60 Q11c What was the project about? Was it about how to complete a step, process, use
61 systems, or how to perform physical jobs, or change attitude/value?
- 62 A11c It's everything. It was on boarding. It was knowledge skills and attitudes.
63 For example, knowledge---what products we sell, skills---how you make a
64 pizza, attitudes--- how you deliver effective customer service. We had twenty-
65 five modules. They are not synchronized
- 66 Q11di Describe the project in a very high level (the process by stages)
- 67 A11di I giggle because of some background. I came onto a team that didn't
68 understand process and levels and project management. In the beginning it
69 was an analysis of the entire role from start to finish in deciding the high level
70 topics, and then picking them in order of need to the business at the time,
71 developing in that manner. Then I would take a particular content grouping
72 and say, "Okay, I'm working on this for the next three weeks." Then breaking
73 it down into its individual parts and developing it. For me and for the
74 timeframe, I had really extremely tight timeframes and there was not a great
75 awareness of what the process should entail. Literally, content gathering,
76 storyboarding and development sort of all mashed into one. I would open up
77 Captivate and just start there. Launching was my job. On the technical side,
78 they were never interested in evaluation. We did build evaluation, but XXXX
79 does not have an LMS and the other caveat to this would be that I was
80 building operations training for franchisees. You cannot force a franchise to
81 deliver the training. I development materials for it and hoped people used
82 them. In fact, honestly, the courses themselves were optional. In essence,
83 everything – because of the franchisee agreement – everything is optional for
84 training. Models are a funny thing. There are the six breakthrough steps of
85 learning and ADDIE and Dicken and Gary and Smith, they are all the same
86 thing. They are all basically ADDIE adjusted around. Probably, if I was to
87 pick a model – and I can't pronounce his name correctly – Rapid learning
88 development, I can't pronounce his name. I probably would follow that. It
89 mostly is about what you can subtract from the process and still provide a
90 quality result. In the inception of this particular project I did build a template.

91 That template followed me the whole way through. There were never any
 92 navigation changes or anything like that. It was basically decided for ease,
 93 expediency and not to confuse our end users. After I developed a particular
 94 content grouping I would present that in a live review, because no one would
 95 read my storyboards. No one reads those things. I would force them, “We’re
 96 sitting down today and we’re going through it.” They would pick things apart
 97 and they would approve the scripts and the graphics, and then I would apply
 98 the backend programming, have one more technical review, throw it at legal if
 99 I needed to, and then push it out. Literally, I was developing 15 minutes of
 100 instruction over the course of two weeks. It was very quick. For example,
 101 how to make a pizza, I broke it down into three different groups, so topping
 102 and saucing. The dough module had to go to the dough people and the people
 103 who only deal with dough and make sure that criteria is correct, if people on
 104 my team were available – but that was always a hit or miss – the product
 105 quality individual and maybe on occasion the director of training. The project
 106 manager did the review. That did not always hold true at the point of review.
 107 We did try to plan it, but sometimes that doesn’t always work out. It was like,
 108 “Hey you, come here. Sit down and review this. Thanks.” Honestly, the best
 109 way to describe this review process – granted, if it was peer reviewed or SME
 110 reviewed, yes. But the real review happens from the users. Honestly, even
 111 the SMEs at that level – and this may be a XXXX specific thing – but they
 112 didn’t always know the actual process or the actual details. We would find
 113 out when it was live and in the field and being tested by users, they would be
 114 like, “Why isn’t this in there?” And I’m like, “Okay, why isn’t this in there?
 115 You were supposed to tell me.” Honestly, I almost – in rapid development
 116 and if you are following the cult of done – that’s actually a really neat way of
 117 making it happen. You don’t need perfection. You don’t. If you are trying to
 118 get information out quickly, timely and at the point of need, put it out there. If
 119 it’s not perfect with eLearning – honestly, with me being able to upload
 120 courses as I saw fit. I could make a change in 30 seconds and throw it back
 121 out there. It was depending – because they had nothing. When I came they
 122 were like, “We don’t care what it takes, just get it out, get it out.” I said,
 123 “Okay, what’s the most important thing right now that you are concerned
 124 about,” and that’s how we decided priority. It involves such a frustrating
 125 process. I’m not going to say that this was the right way to go. Fast paced
 126 environment, we are talking – my function wasn’t to serve the training
 127 department, it was to serve the end user. For example, I would talk to one
 128 individual and I say, “Hold your hands like this,” and the other guy was like,
 129 “No, hold your hands like this.” I was like, “Look, I need one way. Just one
 130 way and we will prescribe that to be XXXX way.” Getting the egos, that be,
 131 to decide on that was extremely difficult. It came down to unfortunately
 132 involving the director of training. I would be like, “All right, S, they are
 133 arguing. Pick one because I have to move. We have to keep going.” There
 134 wasn’t time to deliberate these things. So between having somebody put their
 135 foot down or just knowing that, “Well, this could possibly not be correct, but
 136 we are going to put it out there anyway and hope for the best.” A master

137 performer wasn't convenient. A master performer could be a five star store
 138 in San Diego. There was no way to get to those, not efficiently and not at a
 139 low cost. The XXXX structure is to promote from within, so a lot of the
 140 people that are holding mid level to upper level management positions were
 141 drivers and pizza makers. We would go to them. Then somebody would
 142 argue and then I would go to my boss and say, "Make a decision, please." I
 143 made pizza. I did that too. That is corporate requirement that you spend a
 144 week being a driver or a CSR. I did that. Any time I wanted to there was an
 145 actual kitchen in the building, if I had a question about something I would
 146 wonder down there and say, "Okay, if I tried this with my hands..." My own
 147 experiential process had to factor into it. The way that we delivered the final
 148 product was to use a social collaborative website, not necessarily an LMS.
 149 It's sort of like SharePoint, something called like Light Ray. I would put the
 150 course out there and they are able to comment on it, with each course page at
 151 the bottom of it was my phone number and my email address. I invited all
 152 5,000 stores. If you see something wrong or you don't like it let me know, and
 153 they did. We got countless comments. I don't know how to quantify that. "I
 154 like it. I don't like it. This is wrong. This is right. That's great. Can you do
 155 this? Can we change this?" I mean it was continuous. In a structured
 156 environment – which no longer exists, by the way – I would like to sit down
 157 and given them a form and make PowerPoint presentations and Excel
 158 spreadsheets off of it. The nice thing about XXXX aside from the workload
 159 obviously, was that it was a true – it circled that informal learning process.
 160 They took the courses, my users, and then they would deliberate and talk
 161 about it and comment on it and then train each other. If one guy said I didn't
 162 understand that another guy would pipe in, and I would learn something from
 163 them. It was constantly cycling. It was really awesome. They didn't care
 164 documents. They didn't do it. It has never happened.

165 Q11dii Describe the project in as much low level (steps, tasks) as possible
 166 A11dii So for a particular content group – so I will go back to dough. We called it
 167 dough usage and evaluation. I would first take time to gather all of the old
 168 materials together, write some sort of casual outline, "Okay, this sounds like it
 169 goes here, here, here and here." During that time with all of that I'm picking
 170 graphics at the same time. I'm like, "I need this. I need that. Qualifying the
 171 information to people, is that really correct? Do we want to put that in?" I
 172 would come up with sort of a draft. But only in Captivate, never in
 173 PowerPoint first, never in Word first. Let me correct myself a little bit. When
 174 I walked in – don't laugh or freak out – I said, "All right, what's our process?
 175 When do we write objectives? How do we evaluate them?" All the normal
 176 standard questions and she was like, "We don't write objectives. We just
 177 write training." I fell over in my chair. I was the first formal instructional
 178 developer that they had ever – oh, I think I lost you. I think on the WebEx I
 179 lost you, but that's okay. So I tried it their way for the first part of it. I was
 180 like, "All right, so if you just kind of mish mash it together. I will give it a
 181 shot." I hated it. I did, I hated it from a quality standpoint and an organized,
 182 for the end user, cognitive, junking, all the neat things that we do are

183 instructional developers, none of that was ever applied. So I put on the breaks
 184 like halfway through, I pulled my boss aside and said, “I can’t do this
 185 anymore. From a professional level, I can’t say I’m proud of any of this.
 186 Two, I can’t tell you that it’s working or if it would work or continue to work.
 187 I’m just developing these learning tissues, ZZZZ, it’s crap.” So I was like,
 188 “Okay, this is what we’re going to do. We’re going to sit down and I will
 189 write the objectives.” I went through – and I don’t know what they are
 190 teaching people in colleges and universities – but I went terminal, main steps,
 191 subordinate and “This is my end result. Tell me at least you want them to be
 192 able to evaluate dough so that the customer gets a quality product every time.
 193 Great, that’s what you want me to do.” Fine. So I started out more towards
 194 the end writing a document of objectives and from that gathering all of the
 195 content that would support those objectives, throwing it into Captivate, all the
 196 while taking my own pictures, taking my own video, whatever it needed to be
 197 done, stripping it out of DVDs that existed in the past. We didn’t have time to
 198 hire a video crew and shoot it beautifully, and that was never the intension.
 199 Once I would get a rough draft of kind of how I wanted it in Captivate, we
 200 would do a preliminary review with whoever we could get, “Is it right? Is it
 201 okay?” I mean that’s how we started to go to completion. I would get
 202 through a peer review of some sort, depending on the day. I would finalize all
 203 the graphics and the script. I would try to attempt to get them to sign off final
 204 on the script, because I’m like, “Look, to do voiceovers again and switch a
 205 word is complicated. That’s the hard part.” So after I got that signed off I
 206 would sit down and I would do the voiceovers. I’ve got a great voiceover
 207 voice. So I would all that, do all the timing, do any extra programming if
 208 there was a quiz or like a scenario based on decisions or something like that, if
 209 there was some back end coding. I would do all of that, publish a technical
 210 release and send it out to random people. I was always trying to get
 211 somebody new because I needed fresh eyes. “Sit down, take this, and tell me
 212 technically what’s wrong with it. Does this button not click forward? Does
 213 this exercise not work? Does this animation crash your machine, what?”
 214 After that was done I would really sit to whatever SME or stakeholder was
 215 involved at that point. They would come back to me with their comments and
 216 then I would push it out. Sometimes those last three steps would happen over
 217 the course of two days or three days. I don’t advise it. It’s not something I
 218 would recommend. There are drawbacks. There is a perception from your end
 219 users, which we were always battling. The YouTube culture and the Buzz
 220 feed culture is out there, and it doesn’t matter if it is completely correct. There
 221 is still a perception of it should be perfect, so it’s always fast between, “I got
 222 to get it out. It may not be completely quality. It may not work all that well.
 223 Hey, you know, my boss approved it. Get it out there.” Oh, my boss said so.
 224 They did get easier over time. There was that learning curve coming in. I
 225 needed to understand the industry and understand the vernacular because they
 226 have their own way of talking. There were always lessons learned from one
 227 to the other. By the end, I’m pushing stuff out quickly. They would come to

- 228 me, “Oh, we changed this one thing.” I’m all right, click, click, click, push.
 229 We’re done.
- 230 Q11diii What event/communication marked the beginning of the project?
 231 A11diii First day, they brought me and said, “This is your project.” I said,
 232 “Awesome.” That’s literally, again, not what I recommend. They put a supply
 233 chain manager in the operations training management role. Then she did
 234 some extensive interviewing and couldn’t find anybody, found me and
 235 basically said, “Please come work for me.” Initiation is an interesting word to
 236 describe it. I mean the project is always there. Training new people, training
 237 CSRs, is an ongoing and never ending infinite project. It’s just, how are you
 238 going to approach it at any given point in time. Now they said, “We want to
 239 do an eLearning,” but that’s all they really had decided. “We want
 240 eLearning.” But find an instructional designer, it was picking one off a tree.
 241 They did books and they stopped developing them in 2004. They trained
 242 exclusively through the book. The process was, “I’m a new CSR. I get my
 243 hat and my T shirt that first day.” And they hand me this book with a CD and
 244 I’m supposed to listen to it and there are pauses in the instruction where the
 245 manager was supposed to go with them and coach them on whatever they had
 246 learned. That process devolved very quickly after they released it. People
 247 were not training their associates any which way they saw best fit. The
 248 interesting thing about franchises is sometimes they are big. There is one guy
 249 who owns all the XXXX in Texas. Or sometimes they are small, there is one
 250 guy who ones in Trevor City, Michigan. They can choose to train however
 251 they want. The guy in Texas builds his own LMS, shot all his own videos
 252 and trained his people that way. See I told you, you were going to laugh!
- 253 Q11div What event/communication indicated the completion of the project?
 254 A11div The project was based on a certain section of the business which would just be
 255 the frontline operations, CSRs and drivers. No special events. Well basically, I
 256 quit. I was like, “I’m done. It’s done.” Get somebody else to do this. There
 257 is a job opening at XXXX, by the way, if you want it.
- 258 Q11dv What was your role in the project?
 259 A11dv Honestly, over the years – and this is something that my colleagues now and I
 260 were talking about. They looked to me for a year and a half. They had an
 261 open position for a year and a half. They were looking for a specific sort of
 262 person. They were like, “Why can’t we find this unicorn,” that’s what I call it.
 263 The reason why I got my Master’s degree – I was designing instruction back
 264 in the day, but then I saw over time that all the job postings were demanding it.
 265 Then I got down to the last four candidates at a particular job, and they said,
 266 “Well, you don’t have any adult learning experience,” as far as all the
 267 textbook type things. They said, “You don’t have a Master’s degree so we are
 268 not going with you.” I was like, “All right, that’s it. I got to go back to school.
 269 I did that at 32 years old. It wasn’t the worst thing I ever did. I actually really
 270 enjoyed school. I think maybe someday when I’m older I might go back again
 271 for a different Master’s. Right now I have to pay everything off. The thing I
 272 notice is that the instructional designer position at companies – not contracts,
 273 but at companies – typically want you to know graphic design, you have to

274 know Flash, you have to know Share Point, delivery systems, LMSs,
 275 voiceovers, videographer, all of it. You have to know all of it and then be
 276 willing to learn other things on top of it, plus the performance improvement
 277 philosophies and approaches. It isn't just, "Hey, I play in PowerPoint," that's
 278 not it. That's not it anymore. I mean honestly, it was like, "We got to get it
 279 done. Who is going to do it?" We would just do it. There were times that if
 280 there were old videos that were professionally shot or all the old CDs, the
 281 audio clips, if I could – because I honestly can't stand the sound of my own
 282 voice now. I could care less to ever hear myself speak because of just hours
 283 of audio that I produced for them. If I could get somebody else or get it from
 284 a different source, repurpose something, it was always infinitely quicker to do
 285 that. So I can concentrate. You know what my part in the project really truly
 286 was – it wasn't about developing and it wasn't about this particular project or
 287 just my role at XXXXX – it was more to guide them to a more validated
 288 process, to a more structured, formalized, stable process. I never entirely got
 289 there. We fought. It was a very contentious relationship. Because I was like,
 290 "Look, this is not right. This will not give you things that have longevity and
 291 can be repurposed. You are setting yourselves up for failure." They didn't
 292 necessarily want to hear that. But I tried. I really did try. I hope the next
 293 person that takes that job I wish them all the luck. Honestly, the company
 294 itself – and this is really important for any serious designer or developer or
 295 professional or whatever – they got to want it. They really have to want it. If
 296 they don't want it, the company that they are working for, you can take all this
 297 love that you have for the profession you do and kill it. Honestly, I was
 298 actually asked to design crap, just horrible, baseless, ineffectual instruction.
 299 And I knew it. When I found my present position, they asked me why I was
 300 leaving. Because I get paid a decent amount of money and I get access to all
 301 these toys. I do whatever I want, which is really nice. If I ask for it they give
 302 it to me. It was fun. It was pizza. At least I got pizza every day, right? But
 303 on a professional edification level where you invest all this time in educating
 304 yourself and continuous improvement in your own skill set, and when they
 305 just don't care and they're like, "Just put it out." Taking a paycheck – I had
 306 the luxury of not having just to take a paycheck. I do have that. So I made a
 307 choice. Exactly, I want to have impact.

308 Q11dvi What software and services were used?

309 A11dvi Okay, eLearning suite, Adobe eLearning suite, Photoshop, Captivate,
 310 Audition, Flash, Bridge, which is kind of silly, Dreamweaver. That's
 311 probably it for the suite because the rest of it is kind of crazy, and Adobe
 312 Premier Pro, which is the video software. Other things, I grab whatever I
 313 need. There was some PowerPoint depending on if I needed an X or if I need
 314 a background. It was quicker to develop it in PowerPoint than it is to open up
 315 Photoshop or Illustrator, whatever, and make something, grab some screen
 316 prints. I did use Microsoft Project on my own to organize myself, Microsoft
 317 Word, Microsoft Excel. If I wanted to create a table it was easier to copy it
 318 over from Excel. Oh, Adobe Acrobat Pro, because there were written
 319 materials to go along with some of this stuff. I did the project design for

320 myself. Not required at all. No LMS. It was hosted on a content management
 321 system called Life Ray, and it's basically just like web pages but with the
 322 social media engine on the backside. So they could do discussion groups and
 323 things like that, which I think most companies are moving to. I think LMS are
 324 on the way up.

325 Q11dvii What hardware and devices were used?

326 A11dvii Oh my god. My laptop was – because I used a laptop so I could run around
 327 with. That was basic level, 64 bit Windows system with 8 GB memory in it. I
 328 had a Sony high definition video camera. I don't remember the model
 329 number. I had a Snowball blue microphone, which I loved. I also moved to
 330 the Yeti which is also very nice. I built my own portable sound booth. They
 331 are very easy. Yeah, it's super easy. It is a nice addition to have when you are
 332 trying to record anywhere. I would be recording in conference rooms and in
 333 copy rooms, wherever I could find a quiet spot. I did use my DSLR. I had a
 334 Cannon XT. At times, I've used I Phone video and regular Smartphone
 335 pictures to produce content. Half of those materials were my own possessions.
 336 I don't want to sound bitter because that's not how I am. I did it. I made
 337 whatever impact I could and I left. I don't think they knew what they had in
 338 me. I don't think they understood how much money they saved and what
 339 those turnaround times really mean, and with that turnaround the time the
 340 quality that they got for it. I don't think they understood that. It's only been a
 341 couple of weeks and I've already had the port intern that sat there with me has
 342 called me on a couple of occasions. I was like, "I'll help you, but I can't help
 343 you a lot because then you should be paying me again." That's how that
 344 works out in the real world. I bought all my own books, if I wanted to do
 345 research. That type of stuff was mine. Professional memberships, fifty-fifty
 346 split.

347 Q11e What were the outstanding features of this project?

348 A11e Since good is a relative term, what made this project good for me was I did
 349 get to do everything. There was a high exposure to acquiring new skill sets,
 350 which was for me I really have no barriers. I'm like, "Cool, that's new. Let's
 351 do it." There was also my own – since they had no clue. I got to be as
 352 creative as I wanted to be. There really was no, "We only want it to be a click
 353 forward," they didn't even know that. So branching and scenarios and
 354 decision trees... They had no clue. There was interference on a, "Why can't
 355 we just get it done," kind of thing. But when they left me to my own devices,
 356 "What are you doing now?" I'm like, "Yup, I'm working on those, see you
 357 later." I could do all these things. I would be like, "Hey, look at this
 358 animation I just did in Flash," and they're like, "Oh, that's so cool." Is it cool
 359 for me? I feel bad for them because they didn't know the horizons they could
 360 obtain, but whatever. High exposure to the project was a fairly visible one.
 361 The entire company had to touch it. On an exposure level, just at the high up
 362 kind of thing, on a C level there was a lot of exposure. But also with the more
 363 important people, the CSRs and the drivers that took my training, knowing
 364 that 5,000 stores times 10 to 20 people per store – thousands of people looked
 365 at my training. It went international. Right before I left we had the

366 international trainer’s conference. I picked Captivate just for this reason
367 because you can export the captions and re-import them translated. We were
368 teaching them how to do it. With Captivate you can export the captions, re-
369 import them, say, in French and save out the narration in the slides notes and
370 then get that translated. Then there would be an added cost, because at that
371 point, honestly, I was brave enough – I was like, “Look, I’m just going to do
372 the voiceovers. I will take a voiceover course, teach myself how to do this,
373 it’s not that hard. There are not many people brave enough or talented
374 enough. There is a certain level of talent to be able to do something like that.
375 You do have to act in a way. Yeah like, “I can’t do the voiceovers.” I was
376 like, “Yes you can. You can.” I did do some online reading and I talked to a
377 voiceover artist that lives in An Arbor. I took a lot of tips and tricks from her.
378 I learned some things. I would like to actually do it on the side, but it costs
379 some money to get started. It’s funny that you mention it that I had to do
380 research. I don’t know if I’m just weird – I am weird. I don’t ever shut off. I
381 came home last night and I wrote scenarios for fun. I started building an
382 online module to learn how to bartend because I was just bored. It’s fun for
383 me. I get to practice interactions or programming or applications of certain
384 technologies. Because I’m not using it at work doesn’t mean I can’t play with
385 it on my own. So I’m kind of weird, I admit that. See it’s funny, because I
386 have been so active, I reach out a lot. I’m like, “I want to talk to the people
387 that are like me.” But when you are involved so much with people who aren’t
388 like you, like XXX or MMMM, I was the only one. They were like, “Yeah.” I
389 am on a great team now, an excellent team now. There is an open position too.
390 Q11f Did it occur to you that you wish to have done the project differently?
391 A11f Oh yeah. I would have liked to have had the opportunity to put measurable
392 with it, so I could prove to people that my instructions worked and it did do
393 what we said it was going to do. Halfway through the project it almost
394 entirely was derailed, because from the C level came down to the comment
395 that we don’t think eLearning works. That was a very bad day for me. I’m
396 like, “Well, I know that you think it doesn’t work but you haven’t given me
397 the infrastructure nor the resources to help you realize that it does work or that
398 these things are actually productive. That was kind of a disappointment for
399 me in that respect. I wish I could have just done it without really the
400 sanctioning of the people, of my stakeholders, and just been able to produce a
401 report. But then again the separation from my end users was extremely
402 difficult. I rarely got to talk to users, like go and see them perform and do the
403 analysis what it would require actually. To have the one time, because just
404 like you just heard, I would be finishing up one and starting another. There
405 was never a break. And two, it is franchisees. They have to let you come in.
406 When I walked into a XXXX and told them who I was, these poor people
407 would freak out. Because there is another group called the operations
408 evaluation, basically patrol, who go and ding them and mark them down in
409 performance. So any time they heard somebody from corporate they
410 basically would scatter like cockroaches when you turn the lights on. They
411 would just disappear. “I’m sorry. I didn’t mean to do that. Am I doing this

- 412 right?” Trying to analyze that is almost impossible. It is too bad. They
 413 could be so much better and so brilliant. Their position on a business
 414 viewpoint is very precarious. There are people out there that do it better.
 415 Even though there are all these XXXX everywhere, most people just in
 416 general last about 75 years. That’s kind of the longevity of any company. At
 417 the 75 year point, they either get dissolved or get absorbed into something else
 418 or completely change. XXXX is 50 years old. So it is a kind of a weird thing.
 419 They are stuck in an old environment mindset with a new world – that in itself
 420 is interesting from a performance improvement standpoint.
- 421 Q11g What were the solution(s) to the challenge(s)?
- 422 A11g I refused to start the next project unless we sat down and talked about all the
 423 important parts of approaching something like this. Because the next part was
 424 general managers, and with that was a certification quote process. I’m like,
 425 “If we’re going to go through a certification, we need objectives. We need to
 426 analysis entry behaviors and exit behaviors and map it all out and list all the
 427 tasks and put measurements, because I can’t write evaluation without a goal.”
 428 I can’t do it. I can, but it’s fluffy and stupid. So I refused to start the project,
 429 which again I have the luxury of doing that. I can go to my boss and say,
 430 “No, I’m not doing it.” I don’t recommend that for everybody. You will get
 431 fired. I probably almost got fired at that point. But the director said, “Why
 432 are you refusing to do this project,” and I explained to him, “I can’t in good
 433 conscious create a certification program that people depend on for raises and
 434 promotions without having a sound formation. I won’t do it.” So we brought
 435 everybody in a room. All the C level people that were involved in it and all
 436 the higher level SMEs, which would be like directors and VPs and things like
 437 that. I went, “All right, this is what I’m doing, terminal objectives for each
 438 level. I need it broken down into levels and why are you breaking it down
 439 into levels, and what is the expectation of them walking in? Where should
 440 their skill set be? What numbers are they supposed to be producing?” Four
 441 hours later I had eight people that were shell shocked. They were like, “I
 442 didn’t realize it involved all of this.” I’m like, “Yes, and we’re not even near
 443 being done.” But again, little tiny incremental impact on the process that
 444 XXXX followed or tries to do to create these things. Because if I let them
 445 have their way, they would have sat down, opened up PowerPoint and started
 446 throwing graphics and words in there and said, “Yeah, this is our class.” Not
 447 unusual from a private company standpoint. Again, you have to have a place
 448 that wants it and a group that wants it. They never did. I felt bad. I was
 449 looking for a new job, but I wasn’t doing it whole heartedly. Honestly, I did
 450 have some perks of making my own schedule and working from home when I
 451 wanted to and things like that. But then this beautiful thing crossed my path.
 452 I walked in and put my two weeks in and they were like, “Can we do
 453 anything?” I was like, “Absolutely not. I’m done.”
- 454 Q12a What specific knowledge, concepts, and ideas that helped you?
- 455 A12a I’m big on experiential learning, big on scenario based approaches, telling a
 456 story especially with – I’m looking at 16- to 25-year old eighth grade reading

457 level, more visual, less text, kind of simplified – I don't know if there is a
 458 word for that or philosophy or approach designated for that.
 459 Q12b What soft skills did you use?
 460 A12b I can honestly say my soft skills skill set is fairly weak. Coming from an IT
 461 background, too, I'm a little bit abrupt. I don't even know how to answer that
 462 question. I'm not going to say that every day was peachy. There were times
 463 when I looked at my boss and said, "You know what? I'm going to work for
 464 the rest of the day at home," because we would literally fight at times. She
 465 was like, "I don't understand why you don't just do it this way." I'm like,
 466 "Because it's wrong. Here are three research papers, a book, and a website
 467 telling you that it's wrong." As far as soft skills that I developed for, all
 468 basically customer service and up selling type things. You got to smile.
 469 Oddly enough, I have to train people to do that. Yeah, we smile. Smile when
 470 you talk on the phone. Here is another challenge. They are paying people
 471 minimum wage or less plus tips. You can't get people to work for you. So
 472 you get people that maybe don't have the best social skills. You have to tell
 473 people to take showers at times. "No, you need to comb your hair. Yes you
 474 do. You have to be nice to people." There was a way to walk into XXXX and
 475 videotape them, so we would have candid video to explain this is a bad
 476 opening, this is a good opening, etc. When you walk into a XXXX you are
 477 supposed to say, "Welcome to XXXX" within nine seconds. To get that
 478 culture change to happen, that was a new thing. It took forever, and it still
 479 doesn't happen. Up selling, definitely, that's a soft skill. I use it more now
 480 than I did at XXXX, but convincing people – or being able to explain the time
 481 it takes. Literally I have heard this so many times, "Can't you just take
 482 PowerPoint and dump it into Captivate and be done?" "No." It takes time to
 483 be creative. It takes time to gather content and evaluate it and make sure it is
 484 accurate, all those neat things. So explaining that process and enforcing it,
 485 and enforcing it in a way that I drop off storyboards or printed material for
 486 people, "Okay, so did you look at it? Okay, so you committed to Friday,
 487 right? Okay, so it's Friday. I need that from you today," sort of thing and
 488 trying to impress upon importance and priority and urgency. I guess that is a
 489 soft skill. Occasionally I am good at convincing people. I definitely have a
 490 little bit more success with my own people, by that I mean technical or tech or
 491 computer people or something like that. Everybody's got their own timelines
 492 and their own pressures and things like that, and trying to convince that if they
 493 help me it will help them. That part sometimes is a little bit opaque. I like to
 494 help others. I like helping people like you though. Just in general, I have
 495 done this once before with a graduate. To get people to really understand
 496 what the real world is like. Because I have been with some graduates and I'm
 497 like, "Yeah, it's just like that. It really is." You know, if you are going to be a
 498 designer or a developer of one and you're a team of one, you really have to
 499 wear that hat that's going to get you certain things in the door with certain
 500 levels of the organization. So there is a certain degree of professionalism and
 501 managerial skills that you do need to have. I don't necessarily have them all.
 502 I admit that.

- 503 Q12c What hard skills did you use?
 504 A12c Yeah, I'm a geek. Oh yeah. For that project, writing is not really. Get the
 505 words on the page, get the words set. Make sure they are in the right order,
 506 that's about it. I have dabbled in everything. There were some things, I have
 507 edited video before but I did teach myself Adobe Premier for this project
 508 because I wanted to do more advance things. I did teach myself a little bit
 509 more in action script, to be able to do some things. There is always something
 510 that you just don't know. I used Flash very rarely, one or two things. I did all
 511 my own CSS, a little tiny baby bit of JavaScript. I'm not good at it. There are
 512 other people. Audio, I tried to start out with the best take that you can, which
 513 would mean decent mic, a reasonably well proved script and some degree of
 514 trying to get other people to do that, coaching them on the right way to speak
 515 and timing and inflection and things like that. I told this one girl that she
 516 needed to act like she had smoked a joint, which is a horrible thing to say to
 517 somebody, but she talks so fast and she talks so high. I'm like, "L, take it
 518 down a notch. Act like you had a glass of wine and you are sitting around
 519 with your friends." She got all tense when she started to do voiceovers. I
 520 never really got her to a place – but start out with the best, first take that you
 521 can, because you can do a lot of things with it. And do deliberate pauses, very
 522 deliberate, "Welcome to XXXX" pauses. "This online module gives you the
 523 information you will need to", blah, blah, blah. That way you can take out
 524 full sentences very easily.
- 525 Q12d What attitude did you realize that was helpful for the success of this project?
 526 A12d I would probably say that at one point I have to let my ego about the
 527 perfection level that I wanted to get. I had to let that go. I literally had to say
 528 to myself, "I need to stop caring so much." That was impediment to the
 529 project. There can be too much instructional design. We would all love to do
 530 textbook and beautiful and perfect and have it so prettily documented and
 531 signoffs. I would love to have all those elements. Yeah, that's not going to
 532 happen. Be able to quickly refocus. I would work on one thing and I would
 533 be asked to stop it and start working on something else immediately, fast
 534 turnaround and refocusing all the time. There isn't the luxury of finishing
 535 linearly. If there was a linear word for what that type of multitasking is, that
 536 would be needed to come up with. It's something bigger than that.
- 537 Q13 Which year was the project? What do you wish to have known that you didn't
 538 know back then?
- 539 A13 Oh, 2004 was the last time that projected was updated, the last time the
 540 instruction was updated. When I walked in 2009 they said, "Here." Their
 541 impression was – bless their hearts – "You can just take this and put it online."
 542 I went, "What?" No, we have to start from the very beginning because there
 543 is so much that has changed." Because the thing that they put us through was
 544 pizza prep school, I got to take that about a month and a half in. I actually
 545 started on the first module. They wanted a glossy piece for their 50-year
 546 anniversary party. I started in May and it needed to be done by July. I started
 547 working immediately on that and in about another month I went to something
 548 called pizza prep school. I realized what they were telling me was correct and

- 549 what were really correct were two different things. I wished I had asked
 550 better questions before I had started or even accepted the job. If I would have
 551 known some of the things I might not have said yes to that. I am a little bit
 552 savvier now, as far as that's concerned. As far as specifically the project, I
 553 wish I would have known who really was the boss of things. That was never
 554 really illustrated. There were so many people who thought they were the boss
 555 of it. I was pulled in a lot of different directions. If I had ever just said, "You
 556 are the ruler of this world," that would have greatly helped the whole
 557 situation, if that could have been defined before I even put mouse to screen.
 558 You know, there are a lot of different things that – I would love to talk about
 559 just instructional design, but there is a whole environment which exists and is
 560 impacted by the culture of the business. That culture was a hot mess, a lot of
 561 napoleons but no army. I was the one who jump ship. On another sort of off
 562 tangent – there was another girl that worked designing POS type tings. Her
 563 title was the instructional designer but we worked not even closely related to
 564 each other. She quit too. Usually, at this point if you are of a certain
 565 demographic of 25-35 you lasted about two years at XXXX. I still have
 566 friends in the office and I still go to the workout place. There is a gym in the
 567 basement. I don't have a lot of interaction with my direct colleagues. It was
 568 slightly contentious. They brought me in. They were excited to have a
 569 formally trained instructional designer, but it's like buying an Arabian stallion
 570 and wanting it to pull a little cart. I'm like, "You have no idea what to do with
 571 me." Then when I would suggest things they would go, "Oh, we don't do
 572 things like that here. That is too formal. You are too organized," I had that
 573 one. I'm like, "Are you kidding me? I got to go find my own unicorn heard."
 574 And I did, I found a great place to work.
- 575 Q14 What are the other knowledge, skills or attitude which was not used in the
 576 above project but you used in other Web Based Instruction projects you led?
- 577 A14 Articulate Suite. I think it's called studio actually. Articulate, Quiz Maker,
 578 Engage. Now I get to be a little bit more formalized. I get to need the needs
 579 analysis. I'm more concerned about metrics and formalized approaches
 580 towards eLearning and Web Based Instruction. It would be reduction in
 581 errors, things like that. I have aptitude to actually obtain data about my
 582 projects and then be able to analyze it. There are methodologies and structure
 583 in place to talk to the learners. It's a definitely a more structured environment.
 584 Usage, rates, position, location, they don't test yet either. This company I
 585 work for now has just started. It's kind of the same experience without all the
 586 barriers. They have just implemented the use of Skill Soft and are porting
 587 over some of their instruction education courses to corresponding material that
 588 already exists. So we have level one data, but no more than that.
- 589 Q15 Assuming you are hiring a person as a beginning instructional designer in
 590 Web Based Instruction, what skills are you expecting?
- 591 A15 More than what I see now. I want them to have a basic technical skills set in
 592 graphic design and at least one authoring software package. I don't care
 593 which, although the preference in the industry seems to be Articulate, some
 594 web development. They would at least know how to read HTML. Oh, and

- 595 social media. You have to be a social media baby. There is too much
 596 potential at this point not to at least have a Twitter feed. You need to know
 597 these things. Some sort of performance improvement theory background and
 598 what it takes to take a request from the business and see it through to a
 599 measurable result and know that process. The rest is just gravy. I would
 600 never ask anybody to know all of the crap I know. It's too hard. To make
 601 another me in this world I would have to find an insane person. If we are
 602 talking about a level one specialist, no management skills per se. I would say
 603 basic level of communication – well, you have to be able to converse on a
 604 high verbal level so you can go investigative interviewing and things like that.
 605 Be able to guide people in the right direction. For example, SMEs are like
 606 herding cats. Be able to talk and communicate in a variety medium, so can
 607 you communicate visually? Can you communicate with video? Can you do
 608 those things and be able to convey ideas and concepts? If I found somebody –
 609 if I was a hiring manager right now and I was doing the XXXX project, I
 610 wouldn't hire a beginner. If I had a team of people in place and I had an
 611 opening for somebody to do production on a basic level – like I already have
 612 storyboards and the concepts down and things like that – I would bring on a
 613 new graduate. That way you can help them grow. I don't think any recent
 614 graduate would have 30 percent of those skill sets. It would be impossible. I
 615 think the reason why – I'm a biologist who is an IT person who went into
 616 training and then went into instructional design. There is a pattern of growth
 617 there.
- 618 Q16 Assuming you are hiring a person as an experienced instructional designer in
 619 Web Based Instruction, what skills are you expecting?
- 620 A16 LMS or other content delivery platform experience, audio, video, and graphic
 621 design on a higher level or expertise in one of those areas, and the other two
 622 can lag, a solid foundation in performance improvement, measureable, "I did
 623 this and I did that, I can do a level on through three Kirkpatrick deal," and be
 624 able to articulate well on what that actually means, project management skills
 625 and probably the beginning of management skills. You would want to be able
 626 to promote them to a head of a team.
- 627 Q17 Which direction do you see Web Based Instruction is heading to?
- 628 A17 I see it going to less of the traditional, "This is a welcome slide, this is a
 629 branching slide," you know. The timelines are shorter. The content is less
 630 stable. Rather than having these – because the thing I'm producing today,
 631 right now, its expiration for validity could be six months. The production
 632 values are going to go down-ish. What I mean by that is we can produce these
 633 glossy things with very little tools. I think it's more about being able to show
 634 your results than the actual product. But also being able to do all these fancy
 635 high tech things like informal learning and being able to drive that through
 636 social media.
- 637 Q18 What do you think an instructional designer should do in order to keep up
 638 with this direction?
- 639 A18 I think we already touched on it. I think there are two classifications than
 640 instructional developers or designers or whatever you want to call it. There

641 are the ones that just do it and they get their paycheck and they go home.
 642 They are quickly becoming obsolete. We, for example, are trying to contract
 643 out a particular project right now, and the developer can't realize what we're
 644 trying to get them to do. Her skill set is so narrow. But then there are the
 645 other ones that we already talked about, the weird ones that are constantly
 646 reading, blogging, going to conferences, incorporating old and new and
 647 mashing it up, and not looking at the boundaries but looking for the solutions.
 648 That type of instructional designer, which I don't know if that really is an
 649 instructional designer anymore. I don't even like to call myself an
 650 instructional designer anymore. I didn't get to pick my title. I'm like, "I'm an
 651 eLearning goddess, what are you talking about?" It's all about performance
 652 improvement. If I do that through instruction or a job aid or simply moving
 653 widget from point A to point B, we need to be internal business consultants.

654 Q19 Anything else that was not covered in our conversation but you think is
 655 important?

656 A19 If I was to give advice to a new graduate or to somebody who says they want
 657 to be in this very, very strange and exhilarating profession or be in this
 658 profession, I think – there is a balance to this particular response by the way –
 659 but we really need to as a collective hold ourselves accountable to what this
 660 really means. It's about creating things that have impact. If you are asked to
 661 do something else, really position yourself in a way that you can guide
 662 somebody not to do that. All we do is undervalue what we do. Training
 663 departments and learning departments get asked all the time. Ebbs and flows
 664 with the economy, the economy goes up and they invest more in training, but
 665 they don't realize it really should be the reverse. If we can as a collective
 666 professional industry be able to constantly report on our results, we wouldn't
 667 be in such precarious position all the time.

1

Transcription of Interview 016

- 2 Q1 Good Afternoon, thanks for taking time with me. Can you tell me your current
3 job title?
- 4 A1 I am the program director.
- 5 Q2 How long have you been working in the current position?
- 6 A2 I have been in this position for approximately 6 months.
- 7 Q3 What's your age range: 25-35, 36-45, 46-55, and 56 above?
- 8 A3 46-65
- 9 Q4 Would you say you are actively involved in instructional design?
- 10 A4 Yes, I am.
- 11 Q5 Are there any other positions have you held before, that were related with
12 instructional design?
- 13 A5 Yes, prior to joining YYY which is my current employment I worked for
14 NNNNN Professional Services and in that capacity, I work as the Sr.
15 Development manager as well as lead, instructional designer, project lead, as
16 well as a designer, all at NNNNNN and I was there for about 6 ½ years.
17 Worked for W...row College, I was the director of educational technology
18 and professor in the education department teaching instructional design and
19 educational technology courses for 2 years.
- 20 Q6 How many years accumulatively do you estimate you have worked in
21 design/development for WBI?
- 22 A6 Before that I worked in banking as a member of senior management at Cxxx
23 Bank as a manager, and was training manager for Cxxx bank, and in that
24 capacity I was responsible for managing a state of the art credit training
25 corporate training, corporate U. Worked at bank for over 20 years, but I only
26 worked training for 5-5 ½ years. At NNNNN professional services, starting in
27 2004, about 7 years.
- 28 Q7 In those WBI projects, how many years accumulatively do you estimate have
29 served as a lead instruction designer/developer?
- 30 A7 Lead or manager? Lead of instructional design, maybe in NNNNNN, as
31 leader – maybe 4.
- 32 Q8a What's the major of your bachelor's degree
- 33 A8a I have a bachelor of science degree in Business Administration.,
- 34 Q8b Did you have postgraduate education: Master's, or Ph.D.?(What's the major?)
- 35 A8b MBA in finance and PhD in instructional Technology.
- 36 Q8c Have you had any other training on instructional design?
- 37 A8c No other training in instructional design. I am professional, constantly
38 engaged in online seminars, workshops, professional development,
39 conferences, speaker, I present, I attend. I can chronological those for you. I
40 do it every year.
- 41 Q9 What's the business nature of your current organization: business/industry,
42 education, government/military, health care, independent, other?
- 43 A9 Educational Technology consultant,
- 44 Q10 What's the estimated size of the organization you are working for?
- 45 A10 Small firm, less than 10

- 46 Q11 Can you tell me a Web Based Instruction project you are very proud of or got
47 highly recognized?
- 48 A11 I can think of several. Does it matter about size, or how recent? From 2009-
49 2010 I worked an international assignment in London, England and I was the
50 lead instructional designer. Later became the development manager for a web-
51 based project, was with MOD, Ministry of Defense, equivalent to Department
52 of Defense in US, were converting nonmilitary professional training from
53 instructional to web based development.
- 54 Q11a How many team members in the project?
- 55 A11a Over 100 team members. This is a number not specifically about SME and it
56 includes all personnel that worked for NNNNNNNN that were responsible for
57 analysis, design, and ultimately development of web based courseware. It was
58 a huge project, it is over 275 hours of online web based courses for 3 different
59 branches of the Ministry of Defense – Navy, Air Force, and Army.
- 60 Q11b How long did it last?
- 61 A11b The project is ongoing. I was involved for initial launch and start up phase for
62 1st year. In England, go over, hire personnel, train the personnel in England,
63 get project up and going, build capacity in England, so that UK could continue
64 to service the customer.
- 65 Q11c What was the project about, was it about process, about knowledge, about
66 values, what about the content, what content is it?
- 67 A11c All of the above. We did almost 300 hours of courseware; when you do a
68 curriculum broken into 10 different curriculums. In the Air Force, when you
69 are teaching people about maintaining airplanes and how to fly airplanes, you
70 are covering values, knowledge, skills. You are covering all, it wasn't just
71 one course, it was a curriculum. The 275 hours of web-based coursework; on
72 average a course was 20-35 minutes, so over 400 courses. I didn't develop all
73 of those, what I did was a lead in the analysis of courses for the navy and then
74 after switched over to development manager and provided managerial support
75 for courseware design and development, so again these courses were still
76 being developed, I was only involved with training, hiring, training, and
77 developing people to complete this project.
- 78 Q11di Describe the project in a very high level (the process by stages)
- 79 A11di It was a government contract, NNNNNNNN, my employer partnered with 5-6
80 different companies, put together a proposal, went through the R and Q
81 process and were awarded multi year, multi billion dollar contract that is
82 primarily because expertise to do web based training and development on the
83 scale didn't exist in the country or in government so they brought in private
84 contractors to come in. The web based development project was part of a
85 bigger project that had to do with total change and transformation and how
86 training was being delivered to military in the UK, going from stand up,
87 instructor lead training to a blended solution. As I said, this was first year of a
88 multi year, it was a 10 year project – to go in, analyze the content, determine
89 which content could build a curriculum, take curriculum and migrate to an
90 LMS, develop training plans for different personnel, and then based off of the
91 ultimate blended solution, put together a plan and strategy to developed and

92 designed web based aspect of a course. So in first year, we identified 10
 93 curriculums spread across Army, Navy, and Air Force for phase one of
 94 project, and within those three curriculums identified 275 hours of web based
 95 content for development. So for each subsequent year based on analysis,
 96 different courses and curriculum would be selected and just continue to design
 97 and develop based off the process we put in place for them. Under the analysis
 98 completed up front, we put together a training plan, design development plan
 99 for each curriculum, identify what content should be delivered by what
 100 method of delivery, various methods of delivery, some was stand up, some
 101 was demo, some was OTJ on the job training, others are hands on, direct
 102 instruction, and some was various methods of degree, and some was web.
 103 The analysis was a process - provided the content to be covered, the objectives
 104 and all the requirements for the web. And based off that design the course was
 105 developed, assigned to an instructional designer/developer, and to go through
 106 rigorous review and approval of customer with their feedback and then all
 107 courses included audio, simple to advanced animation, and then delivered
 108 electronically. Customer is responsible for loading actual access onto their
 109 LMS and they were responsible for delivery. Our project was complete upon
 110 delivery of content. When the project is done with development, there were
 111 some evaluations. Course was loaded by client on their LMS and at the end of
 112 each course LMS is administered a Level 1 and a Level 2 assessment. So part
 113 of course development did include a level 2 assessment, what we call a course
 114 quiz. The course quiz included a minimum of 2 questions per objective.
 115 Depending on number of objectives in course, on average for a 30 minute
 116 course, most courses have 4-5 terminal/enabling objectives, so each course
 117 has minimum of 10 questions. Something from evaluations would be fed back
 118 to the course. Level 2 evaluations for the initial pilot courses, that information
 119 was fed back, looped back to team, if they wanted more animation, more
 120 audio, or so, yes, we did incorporate feedback from level 2 into our initial
 121 design and development and we also reviewed and gleaned information from
 122 Levels 1 as well. We didn't get those evaluation feedbacks ourselves, the
 123 client did share. We had weekly team meeting with client and client did share
 124 results with use, and we made adjustments accordingly. We absolutely
 125 followed the five phases of ADDIE model. Regarding each detailed step of
 126 this project, well, NNNNNNN was big on process, so we had a project plan
 127 that pretty much followed the ADDIE process, so early in the process we
 128 spent a lot of time educating the customer, bringing them on board to the
 129 process, so they would know what to expect, and how their expectations
 130 underpinning, and educating them on the requirements because a lot of
 131 customers do not understand that goes into a web course; how many subject
 132 matter experts we needed, when we needed them, how long it would take to
 133 complete the analysis, having access to the actual equipment and tools. If
 134 training was hands on or demo related, we also had to educate them on their
 135 role in terms of providing pictures, photos, taking up to date picture/photos,
 136 all the requirements. So up front we spent a lot of time on planning, resources,
 137 setting up calendars, schedules and so forth. I had a customer who had a full

138 understanding of the process requirement so there to give analysis. Every
139 month, week we would go to the location and provide a presentation again on
140 the specific people now we are working with, not the higher up managers,
141 subject experts, training people, personnel whoever was assigned to us, we
142 would train them, and then we put together a schedule, dates, times that we
143 would be available, the subject matter experts would be available and
144 complete the analysis. Everything was in the project plan, the project plan
145 was broken down into tasks, dates, resources, and we would get buy in from
146 the managers and leadership and upon completion of those specific tasks, sign
147 off an approval, and we would roll out the next month or the next few weeks.
148 And that is how we proceeded through the project plan until complete. On
149 average, it was taking us probably 4 to 6 weeks to complete the analysis,
150 another 2-6 weeks to complete the design, and at every milestone we would
151 receive customer feedback, review, approval and sign off on it. From there
152 we moved into the approved design, the output from the analysis is what
153 provided the foundation for the design phase. The output from the analysis
154 was the specifications for the design phase analysis and were the
155 specifications for the course development. The output from the design phase
156 were the objectives, the content, much of the content, either subject or pre-
157 procedures, references on sources of information, so the development on
158 specifications, so you know if it was going to be level 1, level 2, level 3 again,
159 no animation, simple animation, 3D, all the requirements. And I should say all
160 the courses at the curriculum level. From there, given the requirements, then
161 we would put together a new plan to govern development, and then the project
162 plan would break the development process at a course level down into tasks,
163 procedures, requiring customer sign off approval at each milestone all the way
164 through to completion of course. What we call formative evaluation, we
165 would do a demo or beta where they would go through the actual course, they
166 would mark up the storyboard, make changes, and we put those changes in
167 and they were reviewed again for final signoff, approval, and delivery. Timely
168 wise, on average to do a 30 minute course it was probably taking 6 weeks,
169 longer if a lot of feedback and changes were required. A number of revisions
170 were accounted in that time needed. I am counting revisions. We would do a
171 design document, customer sign off, and approval, that include a revision.
172 Then we will do storyboard, customer sign off revision-approval, and then we
173 would do a view of the web course, and then we would do a beta, and
174 customer sign off, approval, including revisions, and then do delivery. So
175 including all of those revisions, yes, 6 weeks. But often times, once the course
176 was delivered, you had asked me about actual evaluations, the client would do
177 a level 1, level 2 evaluation, often times and the course came back, and those
178 changes were not included in the 6 weeks. So I would say 6-8 weeks for the
179 normal design, development process from beginning to end. Personally as a
180 lead, I was involved part of but not all. Initially when I went over to join the
181 process, the first 4 months I was a lead, and I was involved in all the process
182 only for certain curriculum, not all the curriculum. I had a team, and the team
183 I provided leadership. I had different teams working all over the country in

184 different area, different subject matter experts, working on different courses
 185 within the curriculum at the same time, so I was putting together the schedule,
 186 leading the team with management, reviewing the presentations, the on
 187 boarding, providing leadership. I wasn't doing all of those design tasks but I
 188 was overseeing and managing team members to execute the tasks.

189 When I became the development manager I had team leads working under me,
 190 working with actual design and development, developers executing those
 191 tasks but I was managing and overseeing at that point development of multiple
 192 courses. Many times we had 3-4 curriculums in development at one time, and
 193 courses within each curriculum would be anywhere from 5-20 at one time, we
 194 had 100 people working on this project, so it was a very big experience.
 195 Again, the team leads were responsible for managing it down to the detail
 196 level. My role as development manager is primarily to keep the schedule
 197 moving, to make sure people were on schedule, completing their tasks on
 198 time, getting feedback from the customer so that we could just continue to
 199 report. Because, if you share a project plan and a schedule with a customer,
 200 and you say on this day you have to be available to review storyboards, then
 201 you have to make sure those storyboards are ready. As a manager I was kind
 202 of coordinating the schedule, managing the project, managing the resources to
 203 make sure we could meet the timelines that we had presented to the customer.
 204 Sometimes I did review those storyboard design, sometimes not, I mean my
 205 leads were responsible for working with ISD, reviewing storyboards,
 206 reviewing and checking betas, but all the time particularly when we had some
 207 quality issues, and when we tracked those quality issues back to certain teams
 208 or certain IP's, many times I did review storyboards, designs, documents, or
 209 even attend betas, so I can't say that I did, but that was not my specific day to
 210 day job responsibilities. When I was a lead, I managed instructional designers,
 211 and I think the most I had reporting to me was 8, but that was not on this
 212 project. On this project, the designers did not report directly to me, they
 213 reported to leads, but probably at one time peaked at close to 50-60 designers.
 214 We had 2 Sr. instructional designers or leads, and under each of them they had
 215 two assistant leads, so 2-4-6. For those lead under my supervision, there were
 216 about anywhere from 6-10 instructional designers working for them. So that
 217 is why I say at any given time we had as many as from 40-60 ISDs.

218 We called ISD developer, so they are the same, they are both designer and
 219 developers. There were media people who do programming part. We had a
 220 graphic artist that provided support and graphical access. We had audio people
 221 that provided support for doing the narration, we also had 3D graphic artists
 222 that were advanced animation, and we also had a video specialist that could do
 223 short 30-40 sec video clip, and when needed we had some trained hands on,
 224 we also had an education...that supported us, when you do the broadcast and
 225 you sign in and do the online training, and you can show the talking heads the
 226 teacher along with the PowerPoint content. We also had a facilitator
 227 instructor, we also had another person, can't think what they are called the
 228 product, to do the different edit the format. In addition to developers and
 229 instructional designers, we had a host of instructional supporting people, about

- 230 10-15 people in that category. I had a professional project planner. So I didn't
 231 need to do the project plan. At NNNNNNN we had a professional program
 232 planner office, and we had professional program manager who generated the
 233 project plan, and would also provide a detailed breakout on the schedule, as I
 234 mentioned we updated the schedule every 4 -6 weeks. Now, that was for
 235 design and development. For analysis, I actually developed the project plan
 236 through the analysis phase, and work through schedules directly with clients.
 237 As a lead, at NNNNNNN on smaller projects, I was responsible for
 238 developing the project plan, but not on this large huge project I just described
 239 to you. When I was the direct lead, I put tasks, dates, resources to manage
 240 resources. The resources would be analysts, and the subject matter experts,
 241 and during design and development it was the instructional designer and the
 242 lead along with the customer who would sign off an approval so in some cases
 243 I was a direct manager and in others I was not. To determine who would do
 244 what job or tasks, it was a group effort, the program office actually had
 245 authority to make decisions over hiring and firing, but as a manager I certainly
 246 participated in the interview and selection process, and as a lead for the
 247 analysis phase I actually made the hiring decision recommendation for all the
 248 analysts.
- 249 Q11dii Describe the project in as much low level (steps, tasks) as possible
 250 A11dii (Answered in A11 di)
- 251 Q11diii What event/communication marked the beginning of the project?
 252 A11diii Sometimes it was part of my job to contact customer directly. We were in
 253 constant contact with customers and in most cases we had weekly progress
 254 reporting meetings. It was my job that indicated to train the customer on what
 255 to expect, it was my job to engage the customer in explain the project plan,
 256 and the buy in and approval of the project plan, and then also certainly was
 257 my job to provide project reports and presentations on a weekly or monthly
 258 basis. The leads that worked for me were responsible for day to day to day
 259 customer interaction. It was professional project managers in the professional
 260 management office kept tracking of the progress and the project plan was
 261 update weekly. Those leads have the primary responsibility for reporting
 262 status, have weekly status meetings to determine the team if on schedule, and
 263 if not on schedule we would re-plan and extend the date with customer
 264 approval to update the project plan. I was in more management roll. When the
 265 project was initiated, there were some milestones/events, such as kickoff
 266 meeting, on board or initial training, that's something repeats every time when
 267 have new SME or new personnel, repeat the whole process, also so whenever
 268 we hit milestone we would have celebrations, buy lunch, nothing major, bring
 269 in pizza, or extend congratulations or recognition to people that went beyond
 270 the call of duty to meet a deadline, a little intangible kind of thing.
- 271 Q11div What event/communication indicated the completion of the project?
 272 A11div while I know when the project was completed. I actually came back to the
 273 States in Sept 2010 and at that point we were all the analysis was complete,
 274 and we were right about 50-60% complete on development and delivery, and
 275 so project continued until Spring, March-April 2011 and at that day I know

- 276 they didn't need it, and it was primarily because of the feedback from the
 277 level one evaluation, they had some re-dos. I want to say they finally wrapped
 278 it up June 2011, they went 90 days over. Actually it was pretty good. So they
 279 completed 100% of the analysis, 100% of the design, and it was the
 280 development that went over about 90 days. No celebration or award, or
 281 doesn't know because I had moved on, I'm sure they did, had some kind of
 282 dinner or something, but I had kind of moved on to another project by then.
- 283 Q11dv What was your role in the project?
 284 A11dv (Answered above)
- 285 Q11dvi What software and services were used?
 286 A11dvi It was all in-house development, and we did use Flash, but we also
 287 use...NNNNNNN has proprietary design development system called K...,
 288 and it allowed you to, it would be similar to Captivate or Articulate. Or
 289 Coursebuilder, some of the major authoring tools that are out there. You go in,
 290 and you actually build your story board on line, and you can release those
 291 storyboards to your SMEs or your clients. For input they can do a virtual
 292 online repository, they can actually go online, they can just log in the internet.
 293 Once approval is granted, and access and make changes, approval, etc all
 294 online, and once the storyboard or the course, depending on where you are in
 295 the process, is approved, then the email is automatically generated to the
 296 designer-developer, and the designer-developer will go back in and make the
 297 changes, the customer can only do edits but they weren't really approved and
 298 accepted to the system, so once the kind of design review process could take
 299 place off storyboard and it also can take place off beta where you have a
 300 prototype of the web course and then can come depending on the prototype
 301 level you could grant approval with the audio and animated assets or you can
 302 stage it in phases, it is a good way to have online and customer approval rather
 303 than sending by email. It was a very sophisticated system, and then when the
 304 actual course was complete you could download the assets directly to LMS or
 305 if the customer preferred a CD or some other final delivery we could do that
 306 as well, but or you could sometimes use FPP file too. It was an authoring tool
 307 that had online virtual collaboration. Well, we used Flash for the animation, I
 308 don't know software that they used for the video and audio and 3D. It was just
 309 so many things, and that is why you bring the experts to the table so you don't
 310 have to.
- 311 Q11dvii What hardware and devices were used?
 312 A11dvii There were no hardware and devices been used in the project. Out of the 275
 313 hours of web development probably less than 10% had video. We developed
 314 our own video, but they were very short clips, all less than a minute. Audios
 315 were for illustration or animation purposes Level 1 actually there was no
 316 audio, level 2 courses we had audio that was more for illustration, and level 3
 317 had illustration but also synced to specific processes and procedures, all
 318 sequential time.
- 319 Q11e What were the outstanding features of this project?
 320 A11e I think the size and scope, and being able to take the military and the
 321 government from all antiquated training procedures to update them to state of

322 art cutting edge, delivery, probably was the most outstanding feature which of
 323 course allowed them to increase student motivation, interest, engagement, and
 324 reduced the cost of delivery because they had all of these instructors
 325 delivering this content and now in most cases 30-50% was converted to web
 326 based delivery. I worked in both UK and US on this project. In initial
 327 planning I worked in US, and then once we were ready to implement analysis
 328 actually moved to the UK, and once we hired and trained the analysis team, it
 329 was about 3-4 month, then moved into development and remained onsite as
 330 development manager, then I actually hired and trained my replacement, and I
 331 came back into the States and I coordinated from this site for month or two
 332 and then I rotated off the project. In total, it was probably 4 months in the US,
 333 1 year in UK, and then maybe 4 months in US on the back end.

334 Q11f Did it occur to you that you wish to have done the project differently?

335 A11f Yes, I think that was the biggest area of improvement was the schedule. We
 336 committed to develop that 245 hours in a year, and it was way too aggressive.
 337 What I would have preferred, which is the only way to do that when you have
 338 a real condensed timeline you have more resources so you can develop
 339 simultaneously at the same time. I wish that we had stretched that out over a
 340 longer time frame, because it was just the pace was just too quick. I think our
 341 quality suffered because of that and I think that another thing that we
 342 underestimated because the UK is an English speaking country, we
 343 underestimated the differences in the culture, so that even though they speak
 344 English, it is a foreign country, so there were a lot more things that we should
 345 have planned for that. Took longer in the actual design and development, but
 346 we didn't realize that until we really got into it, so if we had taken more time,
 347 add more time to the design and development, we would have increased the
 348 quality of the actual product that we delivered. The personnel picked in UK,
 349 would have helped, but unfortunately all of the designers and developers were
 350 back in the US, so what we had in the UK were, of course, reviewers, that
 351 were reviewing for language differences and analysis. But because we were
 352 moving at such a rapid case that they didn't catch everything. So
 353 unfortunately we had customers asking things, and of course you never want
 354 that. We didn't have challenge of budget. We negotiated that upfront so we
 355 were able to add the resources within the budget, that was fine. The customer
 356 is the one that dictated the deadline or timeframe, based on that timeframe we
 357 hired the amount of resources that were needed, but it was still very rapid.

358 Q11g What were the solution(s) to the challenge(s)?

359 A11g When you are running a web based project, it is really a triangle: time,
 360 resources, budget. It is an equation, and quality. So if you play with the budget
 361 you are going to impact the time, resources, and quality. If you play with the
 362 time, you will impact resources and quality. So anytime you change a factor in
 363 that equation, it is going to have an impact on the remaining elements. So, in
 364 our particular case, time was a challenge. So we tried our best to balance and
 365 change the time and tried to mitigate the impact on quality by expanding the
 366 budget, and expanding the resources. But in the end, as I told you, we went

367 over by 90 days which is not that bad in a project of this size and magnitude,
 368 but we did go over and then, the quality in some instances suffered.

369 Q12a What specific knowledge, concepts, and ideas that helped you?
 370 A12a People with strong experience and knowledge of transformation or change
 371 theory, because you are dealing with SMEs or customers who are being forced
 372 to change. For example the instructor was an SME who knew that once this
 373 course was implemented that they would lose their jobs, Ok, so, maturity,
 374 experience in change, transformation management, I think is essential, also
 375 stakeholder management when you work on a project of this size, it is very
 376 important that you have managers who have experience with working with a
 377 variety of stakeholders who might have different interests, some being
 378 supportive and positive, some being negative again, so learn how to manage
 379 stakeholders with various agenda I think is important. Of course, you need
 380 people with the skill set to do the job, the analysis, design, development.

381 Q12b What soft skills did you use? Use design skills for project?
 382 A12b Yes, we used, analysis design development skills, absolutely. Other than
 383 communication skills, time management, project management, again just
 384 being a student dealing with stakeholders, understanding politics, how to
 385 manage through all of that. When we had designers and developers who were
 386 instructors and had a basic understanding of the content themselves, that
 387 helped too. As some SME may lose their jobs, making them to cooperate was
 388 critical. In the military it is pretty easy, you just go to their superior to get
 389 orders, but that is not the most proactive and effective manner of getting
 390 cooperation and buy in so what you really try to do is to be considerate of
 391 their time, try to be sensitive to their employment situation, and show respect
 392 for their expertise and knowledge, so you do a lot of stroking, and just be
 393 sensitive, make sure they understand what you have been asked to do, that you
 394 keep the project professional, and that shows sensitivity to their concerns, a lot
 395 of times just listening, letting them vent. I find if you can educate them in the
 396 process of how it works, not be defensive, but be very honest about the pluses
 397 and minuses of web based design, and what it can replace. A lot of people
 398 think that when you're going to do web based training, that you are going to
 399 create courses and train everything on the web when that is not very valid.
 400 Content and learning objectives should never be taught online, so it is a matter
 401 of educating them about web based design and development and what it is you
 402 are doing, many times addressing their fears and concerns will allow them to
 403 be a little more comfortable with you. But at the end of the day, you will have
 404 people who don't want to change, don't want to work with you, and will try to
 405 sabotage your project. So in those cases, you will just have to address those
 406 concerns. What I find is that just like in any technology, it is all about cost
 407 savings, it is about efficiency, it is about cost savings. And at the end of the
 408 day, those companies that are implementing web based training whether it is
 409 education, the government, or ...they are responding to be more efficient,
 410 more effective and reduce costs even though not all of the instructors lose
 411 their jobs, there is a reduction in staff, and that is primarily because the
 412 elements are able to create learning paths and plans, pushing the responsibility

- 413 for training and development onto the employee, and so the end result you
 414 have less people managing those processes and so the end result is that you
 415 are able to reduce that and save dollars.
- 416 Q12c What hard skills did you use?
 417 A12c Hard skills across the board are required, people need to understand the
 418 analysis, design, redesign, development evaluation process ADDIE. You have
 419 to have hard skills. You must understand how a Flash course developed even
 420 though you may not develop the course. You must understand the process for
 421 creating audio files, downloading those into a web course, and asset like
 422 graphic skills or animation. It is important that whoever is working on a
 423 project have a level of knowledge of those things, is that you are talking
 424 about? Have to understand the model, project plan, how the whole project
 425 and process works. From there, depending on your role or responsibilities
 426 will determine hard skills. Obviously for my people doing edit, review, or
 427 language transitional obviously they would need good language skills, good
 428 grammar skills, writing skills. Developers and designers certainly need a
 429 good background in special design, but they also need good language skills,
 430 good writing skills. People doing the audio need to have good speaking skills,
 431 communication skills, so it just depends on your role what skills are needed.
- 432 Q12d What attitude did you realize that was helpful for the success of this project?
 433 A12d Clearly everyone needed to have a positive attitude about the challenge of
 434 meeting the deadlines and schedule, they were very aggressive, so it was
 435 required that everyone have a can-do attitude, that they be part of the team,
 436 and that they have a willingness to work in a chaotic, fast paced environment.
 437 The schedule was a challenge, definitely we needed people who had a positive
 438 attitude about achieving the goals. Secondly, we need people who were
 439 comfortable in self initiation, so if there was something that needed to be
 440 done, except there is somebody to tell you to do it, because the timeframe, we
 441 needed people who were self starters, were self motivated, and would take on
 442 more responsibilities and complete tasks, even though it may have fallen
 443 outside of their job responsibilities. People with good judgment, people who
 444 could say I know how to do this, or I'll take care of it, and or I don't know
 445 how to do this. So rather than mess it up, let me go talk to my lead manager,
 446 and see if they can give me some guidance, so I know how to handle it. So
 447 people shall have good judgment. I would also say that people that were open
 448 to change. When you have innovation replacing something that has been in
 449 place for many years with technology change, you have people who are early
 450 adopters come on board, you have people who drag their feet and want to
 451 know what is in it for me, people who are resistant to change. What we really
 452 need is that people were willing and flexible and could change, and had a
 453 positive attitude about embracing change.
- 454 Q13 What do you wish to have known that you didn't know back then?
 455 A13 I really wish that I knew from the culture standpoint that I wish I had a better
 456 understanding of the cultural changes between the UK and the US. If I had a
 457 better idea of what those were and how to handle the cultural issues we could
 458 have avoided a lot of mistake. If we would have had a better impact of the

459 time change, in the U.K. it is 5 hours ahead of us, that meant when they were
 460 leaving work, the U.S. people were just getting to work, we had to take some
 461 adjustments so that when we said “by close of business”, the U.S. was closing
 462 business and the US people had gone home. There were a lot of cultural
 463 changes and adjustments, language changes that we had to learn on the fly.
 464 And I think if we had done a better job of preparing people for the culture
 465 differences, the time differences, we could have avoided a lot of problems. So
 466 I wish I had known the impact of those things ahead of time and I could have
 467 accounted for those things. For example, I didn’t know the military
 468 essentially, the military and adjust the culture, what is the best way to say this.
 469 Most people just don’t work during Christmas, the whole month of December
 470 they take off, while in the U.S. we take Christmas and maybe a week or two
 471 weeks, they take off the whole month off. Another example, for Easter, we
 472 have Good Friday and Easter, but they take two weeks. Most people take
 473 their vacations on or around the Easter holiday. Christian holidays are very
 474 important and so essentially that is like our Christmas here, most of people are
 475 out of for a week or two weeks, over there two three weeks. So essentially the
 476 project came to a standstill during that timeframe. Also, different words,
 477 English words mean different things here versus there, the pronunciation, even
 478 though it is English, so “aluminum” is “alamenium” ray...so it is
 479 pronunciation. So we had to redo a lot of audio because of differences in the
 480 culture and the pronunciation, the way thing they say. You can say it one way,
 481 they would say “oh, no, it is wrong,” but not wrong it is just how they say it.
 482 And like the date, we do April 17, we do the month, the day, the year; they do
 483 the year, the day, the month. If I had known those we could have allotted for
 484 those, what happened was that you don’t want to do is have changes, get all
 485 the way to a web course and you have all the information and you have to
 486 change it is very expensive and very time consuming, where if you would
 487 have known upfront you could have written it correctly in the first place.
 488 In the audio, to deal with American accent and British accent, we had British
 489 narrator, but they didn’t say, “Hi, you have this written wrong”. So to pay
 490 someone to narrate, to take those files, those MP3s, and embed those in the
 491 course and to have a customer or somebody in U.K. to review those and say
 492 they are wrong, you have to go back and re-narrate. So if we had a better
 493 handle on the cultural differences, we made a lot of assumptions because they
 494 were English speaking, because they were English speaking, but if we had
 495 known those things up front we could have planned for those, but we didn’t.
 496 So it caused re-dos.

497 Q14 What are the other knowledge, skills or attitude which were not used in the
 498 above project but you used in other Web Based Instruction projects you led?
 499 A14 Definitely you need human performance technology skills, consulting skills,
 500 need to know how to go in and perform organizational analysis, cost analysis,
 501 perhaps even a little bit of Six Sigma where you go in and consult problem
 502 solve and effectively identify costs associated with inefficiencies, identify
 503 waste, and so I think that organizations that are looking to bring convert to
 504 web based training, they want you to be able to come in and determine the

- 505 current state, recommend the future state, come up with interventions, that
 506 need to be implemented to take the company or organization to make the
 507 changes they are looking at. So one needs to be versed in ability to HPT, Six
 508 Sigma, or other forms of change and consulting methodologies, you need
 509 those skills in your tool kit.
- 510 Q15 Assuming you are hiring a person as a beginning instructional designer in
 511 Web Based Instruction, what skills are you expecting?
- 512 A15 Depends on their role, if they are a designer-developer they need to know
 513 Flash, storyboarding, how to use authoring tools, how to write an audio and
 514 video script, they need to know how to develop assessments and quizzes, need
 515 to understand a whole theory behind criterion reference tests and how you can
 516 create objectives supported by tasks, they need to know how a course kind of
 517 flows, how you build a course from beginning to end through assessment,
 518 need to understand how to work with clients as subject matter experts, need
 519 time management and good project management skills.
- 520 Q16 Assuming you are hiring a person as an experienced instructional designer in
 521 Web Based Instruction, what skills are you expecting?
- 522 A16 An experienced instructional designer needs all of those things, but they also
 523 need to be able to manage clients and multiple courses in project at the same
 524 time. Regarding the minimal education requirement, instructional design
 525 developers should have instructional degrees in instructional design through
 526 technology, for beginner and expert both. I think this is professional where
 527 you should come out of school and have certification. I also think that the
 528 more advanced instructional designers shall have training in HPT and also Six
 529 Sigma. They should be certified at least Green Belt if not Black Belt. I don't
 530 believe they should be Black Belt. Definitely they should be certified in Six
 531 Sigma and Green Belt. I also think they need to have training and certification
 532 in HPT. It also helps to have seniors and design development or managers to
 533 have experience in training, I mean in business, sales, marketing, consulting,
 534 as well as basic business because you do a lot of proposals, a lot of budgets,
 535 and also project management.
- 536 Q17 Which direction do you see Web Based Instruction is heading to?
- 537 A17 I think it is becoming more, I think the technology is allowing for rapid design
 538 and development, rapid prototyping. I see it being more virtual, allowing for
 539 more online collaboration. I also see integration of distance education with
 540 virtual instructors being incorporated into web based design or to supplement
 541 web based design. And then I see it becoming even more prescriptive where
 542 individuals regardless of the profession will be able to go into online course
 543 wares and assigned up for online courses, I see it being more prevalent and
 544 more accepted. Those are more informal training. Across industries, across
 545 business sectors, and across professions. We have hospitals and doctors now
 546 are doing online training, and not just training, we can do 3D surgery now,
 547 and I need to practice online versus cadaver. I see the application being
 548 utilized in new frontiers, industry, and professions.
- 549 Q18 What do you think an instructional designer should do in order to keep up
 550 with this direction?

551 A18 I think it is very important that instruction designers are trained properly in
552 analysis, and how to correctly identify training objectives that are appropriate
553 for web and not appropriate for web, and also understand the requirements,
554 understand how to treat the content to allow the learners to be effective. For
555 example, if I am, going back to the medical example where doctors are
556 practicing certain medical procedures, that can't be a page turner in a course
557 without audio. Designers need to understand how to match the level of
558 animation, audio, to sequence level of the audio for audio with the content. By
559 the same token, if it is just an awareness course, maybe you don't even need
560 audio, maybe just text and still define...How to march the instructional
561 delivery with the learning goals and objectives is just going to be critical. So
562 designers need to be trained in how to do that. To keep up with new
563 technology, I do think it is important that designers are trained in a spectrum
564 of tools. When I was in school, we learned Dreamweaver and that was it, and
565 I don't think that is sufficient anymore. Let me just say that regardless of the
566 method of delivery that the instructional design process at high level is the
567 same. I might chunk my content differently, I might break it down into
568 smaller chunks, large chunks, I may focus on one objective or five objectives,
569 but how that course is laid out and how people learn remains the same. So I do
570 think that if you make sure that, and instructional designers understand the
571 design development process and how people learn and if you provide them
572 with a spectrum of authoring tools I think they can make that lead
573 to...especial those...For me I don't know how to use Articulate. I taught my
574 self how to use Coursebuilder. So for me to move from tool 1 to tool 2 was
575 easy. I know how to use Flash, so I know how to do simple animation in
576 Adobe, and Photoshop. So I think if you train designers on a spectrum of
577 different tools, how do you use audio tools, how do you use video tools, how
578 do you use still photo images, how do you do authoring tools, I think then it
579 becomes important to them to be able to gravitate to a new tool. When I got
580 out of school I was at a disadvantage because the only thing we learned was
581 Dreamweaver, and then when I entered the workforce nobody was using
582 Dreamweaver. I think if you give them a spectrum of tools and skills. I was a
583 business/finance major when I came out of school and fortunately I learned
584 how to do online modeling, create balance sheets, income statement, financial
585 projections, and also how to do forecasting models online; I learned how to do
586 that tool in school, so when I joined the work force, CMACA didn't use the
587 same tool that I learned on at school, but I could readily learn how to use that
588 tool because I knew what I had to do. But I just think that educational
589 professionals will need to do the same, and equip the students to design
590 courses that have different methods of delivery and more than one tool, and I
591 think that when students come out and join the workforce where they will be
592 able to quickly change the specific tools that they will be able to use by that
593 employer. Unfortunately, right now too many designer-developers don't
594 know to work with video, don't know how to work with audio files, and that
595 is unacceptable. The program did not train them how to use those equipment.
596 How can you say you are an instructional designer and you don't know those

- 597 things? I just don't think that is correct. They just need to incorporate into
 598 school curriculum. I think different schools that are providing degrees in
 599 instructional design need to include all of those tools and software program
 600 into their programs, but they are not doing that and that is unacceptable. It
 601 should be in the program. When I graduated with my Master's, I learned how
 602 to use Excel, IBM Lotus application, so when I went to work for employer
 603 regardless what software that employer use, I knew how to create financial
 604 spreadsheets.
- 605 Q19 Anything else that was not covered in our conversation but you think is
 606 important?
- 607 A19 Students need strong background in instructional design theory, learning
 608 theory, I think that is critical that they understand the theoretical domain of the
 609 field. Many times I have designers that do things and they don't know why
 610 they do it. I actually had a designer develop a course and didn't have an
 611 advance organizer, didn't have a table of contents, or didn't state purpose of
 612 the course. I think understanding the domains of the field and why we do
 613 things, theoretical background, of call it ADDIE model, is critical. Now the
 614 other thing I would say, I think that students need practical experience too,
 615 whether they do internship, whether they required to developing courses in an
 616 actual school, I do think that the practical experience is just as important as a
 617 theoretical background. They need practice, and they should have a portfolio
 618 when they come to the workforce of experience where at least they have been
 619 exposed to development and design on a practical level. Strong background in
 620 summative and formative evaluation would help too.

APPENDIX G RAW DATA

No.	Skill Description	001	002	003	004	005	006	007	008	009	010	012	013	014	015	016
1	Analyze the given data (needs analysis, course requirements, performance analysis, existing content etc.) from customers or stakeholders	54-56, 70-72	141- 143, 365- 370,			189,		48-49,	419- 426,	158- 162,	192- 195, 262- 268, 297- 304,	73-82, 87-90, 117- 121, 264- 269,		78-83, 106- 108,	167-168,	
2	Create relevant learning objectives and corresponding instructional strategies	57-58, 278- 281, 420, 422- 424,	95, 164- 167, 177- 178, 313- 317,			274- 275,	127- 129,	60-61, 168- 174,	99-102, 128- 130, 406- 407,		355- 357,	485- 486,	106, 235- 239,	68-70, 111- 114, 115, 222- 223, 288- 289, 614,	68-70, 188-194, 353-354, 425-427,	103- 104, 155- 156, 515- 516, 552- 554, 560- 562,
3	Ensure the interface is created and compatible with other media elements	58, 357- 359,														
4	Develop and utilize testing and review strategies for quality control	59, 62- 63, 234, 250- 251, 269- 270,	98-99, 105- 106, 237- 239, 248- 253, 259- 262, 281- 284,	96-99, 57,	166- 168, 198- 200,	389- 390,	80-84, 214- 216,	63-65,	147- 148,	83, 93- 94,		150- 152, 226- 227, 566, 568,		124- 130,	98, 107- 110, 210-213,	345- 348,
5	Create storyboards with descriptions for graphics, audio, video, interaction, and simulation, as well as audio scripts	62, 266- 268, 324- 325, 421- 422,	95, 205- 209,	69-70, 95,	108- 109, 163- 164, 193- 194, 302,	94, 297,	300- 303,		110- 116,	120- 123, 127- 128,	436,	551,		118- 119, 289- 291, 307, 513- 522,	76, 169- 172,	513,

6	Educate, mentor and provide documentations to the team or other related staff about the right procedure	373-379, 432-434,	473-474,			117-119, 290-292, 582-583,	709-710,							514-515,	
7	Revise as necessary based on the feedback from customer(s) or sample audience	67, 114-115, 292-293, 297-298,	102, 212-213, 248, 253-254,	81-82, 95,	119, 202-209,	394-396,	135,		87-88, 140-141,	353-354,	204,		147-149, 170, 320-321,	120-121, 227-228,	119-122, 166, 169-175,
8	Create a prototype to communicate the look and feel and/or basic functionality	73-78,	197-204,			120-121,	159-166,					200-209, 232-235, 241-243, 246-249,			538,
9	Accommodate customer's or stakeholder's needs, schedule, style, and culture	91-92, 185-188,			228-229, 480-503, 579-581,	207-211, 598,	147-148, 467-468,		249-251,	95-96, 468-470,	223-224, 279-283, 319-320, 352-356, 381-389, 394-403,	104, 125-126, 182-187, 538-545,		224-226,	390-391,
10	Undertake content research and analysis utilizing existing or public resources	96-101,	151-156,	65-68, 172-175,	107-108, 217-218,	145, 479-481,	298,	61-62, 97-99,	96-97, 335-336,	109-114,	268-275, 622-627,	85-87,	86-87, 107-110,	85-87,	75, 483-484,
11	Build and maintain effective relationship with SMEs, customers or stakeholders, including managing difficult SMEs, customers or stakeholders	101-104, 194-201,	382-400,	119-122, 222-223,	287-293, 319-320, 414-439, 650-651,	248-270, 527-529, 560-561, 565-573,	274-281, 306-309, 354-358, 394-403, 463-466, 557-559,	210-211,				138-142, 215-216, 244-245, 269-278, 294-298, 389-391, 460-	191-198, 288-292, 316-318, 325-328, 416-431, 496-502, 554-	632-633,	370-380, 387-388, 518,

											475, 553-558,	562, 578,				
12	Validate content or strategies by formative or summative evaluation or both with sample audience onsite or remotely	113-114, 120-124, 291-292, 294-297, 431-432,		56-57, 79-81,	121-124,	554-556,		187-190,	149-150,	97-98,	522-525,	153-157, 185-186, 194-198,	187-189,	162,	110-115, 149-155, 199-201, 582-583,	118-119, 164-165,
13	Deliver and implement the end product (to the customer) in a format or platform appropriate for the learning and management environment	67, 115-116, 298,			71-72, 125-126, 210-212, 648-649,	80-85,	77-78, 187,	67, 92-93, 156,	152-160,	84, 233-235,	335-336,	252, 430-431,	114-115, 286-288,	375-377, 630,	77, 147-149,	107-108,
14	Develop and implement level 1 and/or level 2 evaluation plans	83-84, 124-126, 293-294,	109-111, 114-120,	70-71, 82-85, 95, 108,		168-170, 306-309,	184-186, 540-541,	65-66,	105-106, 261,	84, 201-202,		187-192,		162-164,	78, 391-393, 622-623,	111-117, 514-515,
15	Create efficient workflow and platform for internal and external collaboration	63-67, 129-135, 282-284, 344-345	232-237,	74-76,	48-49, 201-202, 673-692,	559-560,	239,	73-74,	138-146, 340-349,	101-103, 145-147,	89-91, 97-100, 149-152, 476-481, 827-833,	165-172, 228-229, 236-238,		198, 227-230, 336-345,		96-97, 424-425,
16	Design and develop appropriate interactivity or instructional activities to allow learners to practice, apply, and engage	139-144, 285-286,	183-185, 311, 353-355,	123-130,	73-76, 153-157, 389-390, 613-614,		179-181, 303, 360-365,		269-283,	135-136, 216-218,	899-901,	374-375,	114, 163-168, 405-407, 686,	54-58, 301-306, 310-314, 346-352, 413-		

														415,		
17	Design visually appealing instructional materials	144-145, 355,			508-510,		359,	167, 190-196,		282,	723-724, 898-899, 915-916,		633-635,	70, 322-331,		
18	Add interesting and fun elements to the learning experience	147, 349,			67-71, 326-336, 390-393, 403-404,	328-331, 333-338,	360,						609-610, 621-623, 687-689,	68, 301, 419-420,		
19	Manage budget	160-161,	223-226,	103-106, 159-160,	396-398,		167-172, 253-256, 283-290, 708,						302-303,			534,
20	Provide operational templates, other technical specifications, standards, and repository to achieve efficiency and consistency within the team	161-165, 325-326, 337-339, 343-344, 430-431,	168-169, 191-196,			312-317, 331-332,	150-156,	123-131, 152, 314-315,	121-123, 160-161,			231-236,		119-123, 345-346,	90-91,	
21	Collect, understand and analyze learner characteristics	167-169, 205-206,	176, 327-328,		237-247,	190		175-176,	303-308, 357-361, 382-389, 407-408,	103-106, 256-257,	618-619,		59-62, 105, 123, 398-403,		79-84,	

22	Promote and apply instructional principles, theories, and research results to the instructional system design process	171-174, 381-382,	345-348, 443-449, 455-457,	150-154, 166, 200, 210,		533-545, 615-616, 690,	111-113, 443-459, 666-675,	206-207, 236-240, 304-307, 368-372,	322-324, 441-444, 521-522,	227, 278-279,	289-290, 556-565, 575-576, 803-820, 874-884, 951-953, 964, 1157-1160,	368-371,	455-460, 547, 636-638, 651-657,	458-461, 608-610,	86-90, 597-599,	124-125, 607-613,
23	Write and edit text clearly, correctly and appropriately for the target audience	176, 392, 420,	350-353, 404-408, 457,	156, 205,		271-274, 548-549, 592, 617, 669-673,	514, 695-700,		444,	244, 273,	428-429, 649-650,	421-422, 530-531,		76-77, 483-494, 600, 610-612,		427-428,
24	Pay attention to details	176,	350, 457,									638,		598,		
25	Lead, manage, and coordinate with team members	120, 176-178, 239-241, 305-314, 320, 322-323, 326-327, 385-386, 398-399, 430,	480,	73-74, 142, 212-213, 217,	318,	128-129, 134-136,	70-72, 93-94, 219-222, 262-264, 282, 292-293, 312-313, 345-346, 482-485, 707,		51-52, 125-126, 131-133, 222-224, 229, 453, 509-510,	182-185, 196-198, 284-285,	957-962, 1131-1134,	172-181, 245-246, 534-538, 553,	309-311, 578-579, 580-581, 640,	90-93, 130-131, 184-185, 321-322, 434-438, 448-450, 479-482, 601-602,	625-626,	104-105, 182-183, 186-188, 201-203,
26	Communicate clearly and effectively in a language understood by developers	178-181, 212-216, 340-342,	215-221, 244-247,		605-607,		368-369,	319, 320-322,	455,		973-976,	238-240, 527, 557,		133-135, 189-190, 425-430, 441-448,		

													497-500, 522-527,			
27	Be creative and innovative	183,			401, 581-585, 641-645,	640-641,		111-119,	483-490,	251,	1336-1346,		77-84, 318-320, 605, 615-616,	114-115, 138, 173-174, 297-300, 359-361, 413, 589,	482-483,	
28	Ask the right questions to extract information from SMEs and stakeholders	188-194,	143-148, 240-243, 356-365,		139-141, 218-219, 412-414,	222-227, 559, 633,	86-89, 115-120, 514-518,	211, 232-233,	330-333,	90-91, 231-232, 273,			126-127, 218-228, 245-246, 506-523,		603-604,	
29	Be patient	205, 394-395,				598-599,										
30	Study the knowledge of the subject matter with interest and curiosity	205,	371-372, 431-436,		467-468,									87-88, 215-218,	142-147,	
31	Support and coordinate with the project manager/ manager	238, 321,	289,		308-317,	31-32,	271,		228, 417-419,							
32	Conduct focus group to assist task analysis	246-247, 431,							409,							
33	Chunk or sequence instructional content for a course	258-259, 260-263,		69,	144-149, 152, 182-183,		121-122, 299-300,		102-105,	83, 118-119,			228-231,	223-224, 467,	70,	156-157,

34	Plan and stage a sign-off or buy-in process with the customer/stakeholders	264-265,	170-171, 255-256,		109,	122-123, 338-341, 369-372, 381-386,	91-92, 136, 173-175,		216-222, 337-340,		331, 467,		152-158, 333-338,	194-196,	97, 203-205, 214-216,	105-106, 145-147, 150-151, 165-166, 166-167, 255-256,
35	Select and partner with the vendor or get support from another team	321,		51-53, 99-101, 161,	258-259, 376-373,	72-76, 114-115, 349-355, 363-365,	72-76, 202-204, 207-211, 291-292, 436-441, 490-494,		52-53, 284-285, 403-404,		438-441,		352-360,			231-233,
36	Keep track and report on project progress	323-324, 386-389,	289-291,	156-157, 210-211,	220-223,		226-227, 269, 480,		337,	147,	343-350,	143-149, 158-164,	382-389, 576-578, 580, 587-590,	232-234,	624,	196-198, 257, 535,
37	Identify the capabilities of commonly available software and tools	334-335, 339-340,	512-513,		516-517, 550-573,	618-620,	524-528, 686-688,	319-320,	352-354, 374-375, 440, 446-447,	274-277,	459-461, 1210,	488-494,		508-513, 527-532, 535-538, 542-544, 621-622,		
38	Maintain good computer skills in general	203, 392,	404, 487-490,	163-165, 202-203,	346-347, 506-508,		682-683,	142-146, 290-291,	448-449,	244, 274,	455-459, 768-770, 865, 892-898,			592-594,	419-422,	

39	Respect others and treat them fair and professionally	400,		122-123,		524-526, 559, 564-565,	417-424, 479, 495-496, 559-572, 709,		333-335, 445,		220-223, 251-253, 597-598, 955-957, 964-965,	505-509, 572,	437-438,		391-394,	
40	Learn and try out emerging technologies and methodologies, be open minded	406,		177,	469-471, 603-604, 635-636, 705-710,	593-596, 627-631,	683-686, 710-711, 725,	289-290,	504, 518,	267-269, 273, 296-305,	604-606, 796-798, 861-862, 932-934, 1061-1063,		611-612, 672-681, 698-717, 736-740,	538-540,	276, 376-378, 507-510, 646-647,	447-453, 563-579,
41	Understand the overall business process and objectives	409-410,					462-463,	240-242, 264-279, 304,	395-397, 497-500,	198-200,		480-482,			507-508,	
42	Educate SMEs and customers/vendors/stakeholders			76-79,	404-410,	90-91, 236-239,	388-389,	243-250,					273-281, 323-324, 531-532, 591-598,	602-605,	287-288, 605-606,	127-136, 137-142, 395-403,
43	Join professional organizations and social groups and attend the meetings and events, physically or virtually	441,	515-527,	246-247, 258-262,	698-701, 712-714,	689, 694-697,	13, 711, 725-726,		522-523,	305-310,	1210-1219,	620-621, 627-630,	741-742, 753-757,	653, 658-665,	646,	37-39,
44	Read widely on professional discussions and publications	445-447,	439-442, 501-511,	246,	695-698,		711, 726,		503, 518,			631-633,	732, 757-758,	653-654,	645-646,	
45	Network regularly with other professionals			246, 258,	724,	697-698,					1220-1228,		749-752,			

46	Develop and implement level 3 and/or level 4 evaluation plans		127-131,		76-77, 111-114,			178-181,		351-353,		116-120, 169-181,		155-158,	
47	Observe and analyze master performers to assist task analysis		157-159, 327,		61-63, 138-139,			86-93,	258-259,			144-151,		402-403,	
48	Work with remote team members, SMEs, and customers/vendors/stakeholders		161-163,	143-147,	44-48, 226-228, 229-235,		84-86, 594-601,	42-43, 136-138, 516,					400-404,		183-184, 331, 539,
49	Determine appropriate technique, technology, and media to support learning objectives and strategies		187-188,	191-193, 213-214,	142-143,	211-217, 302-306, 372-374, 549-552,	199-200,	262-269, 288-294, 433,	94-97, 124-127, 209-214, 236-239,	140-144, 307-308, 378-379,		93-96, 111-113, 249-257, 403-405, 469-473,	363-369, 469-474, 569-579, 589-592,	579-580, 606-608,	99-102, 157-159, 557-558,
50	Manage time efficiently	161,	229-230, 372-377,	99, 221,	374-376, 459-464,	367-369, 419-423,	99-106, 205-206, 212-213, 268, 403-408, 708,	378,	150-154,	103-104, 332-334, 515-518, 835-839,	184-185,	311-313, 369,	152-156, 240-244, 451-456,	74,	337-339, 364-366, 519,
51	Work on multiple projects at a time		377-382, 457-458,				430-431,		245-247,						191-194, 523-524,
52	Organize and archive documents and other materials	385,				378-381,	480,		244-245,				554,		
53	Ensure the instructional content is appropriate in language and culture for global audience and translation		408-413, 416-423,	166-169,		657-659,	614-663,			338-342, 667-685,					342-345, 455-496,
54	Identify the needs and performance gap		326,	49-50, 201, 208-210,	262-274,	130-132, 190-199,		60-86, 212-215,	259-262,	398-399,	93-96,		629,	578-579, 581-582,	500-507,

55	Write design documents	61, 252-255,	179-181,	53-55,	108, 178-181,	92-93, 270-271, 276-281,	89-90, 295,	313-314,	95, 106-108,	92-93, 228-229,	423, 462-467,	550-551,	363,	117-118,	168-169,	98-99,
56	Understand and utilize LMS or other implementation environment for implementation, training management and possibly performance improvement recommendation			59-60, 165,		163-164,	532-538, 541-548, 582-585, 688-691,	311-312,	151-152, 162-166, 354-356,		449-451, 1195-1198,			379-380,	274, 620,	
57	Set up and schedule training sessions			58, 143,						132-133,						
58	Administrative registration process			60-62, 101-102, 160-161,	336-339,											
59	Organize a set of related content into a curriculum or program	87-88, 148-152,				416-418,			35-37,		365-376,			62-65,		67-72, 88-89, 92-95,
60	Write training/business proposals	110,														534,
61	Apply message design principles for screen design		339-340, 413-416,		614-624,		520-524, 675-682,		324-327, 520,	274,	724,	373-374, 375-376,	608-609,	267-269, 464-466,		
62	Create and edit graphics and other non-multimedia instructional materials			106-108, 109,	194,	321-324, 465-466,		96, 291,	286-288,	83,	162-165, 305, 423-424, 1198-1199,	240-242, 306-308, 571,	113, 364-366, 549,	307-310, 535, 592-593, 622,	76, 195-196, 273, 333-335, 591-592, 620-621,	513,
63	Produce and edit animation, video and audio web materials				61, 89-90, 303, 324-325, 351-356, 519-	94, 362-363,		119, 134-140,	126-127, 297-299,	282-284,	306, 334-335, 424, 568-575,		113, 262-266, 362, 548,	75, 620,	196-197, 273, 328-333, 620,	593-595,

					521,											
64	Do programming or coding with computer languages			203,	88-89, 219-220, 302, 340-342, 517-519,			131-133, 207-208,	49,		723, 731-723, 967-968,	423-425,			97-98, 207-209,	
65	Collect, establish and disseminate lessons learned and best practices within the team or for one's future work	367-371,	328-329,	134-137, 220-221,	363-364,	489-521,										
66	Benchmark other organizations			249-250,			707,		169-176,							
67	Evaluate and determine appropriate tools for design and development				189, 545-546, 589-590,	217-220,	130-133, 323-325,	99-108, 199-205,			251-252, 305-306,	159-163, 212-216, 363,	314-318, 372-375, 378-379,	313-318, 366-367,		
68	Keep proprietary information confidential and follow the required procedures				248-250, 277-279,											
69	Listen well to understand and translate information for instruction				443-458,				454,		602,	510-522,		597,		
70	Be passionate and enjoy your job				476-478,	598,686,	572-578,		391-394, 529-532,		773-782, 856-860, 932,		409-411,		657,	
71	Work with the combined roles of project manager, instructional designer, instructional developer in a given project			94,	303, 521-523, 631-632,	27-29, 453,		78-80, 95, 217, 297-298,		85-86, 169,	432-434, 862-865,		551-552, 642-647,		348-349,	

72	Create project plans					107, 419,	257-262,						307-309, 372-382,	319-320,	126, 136-137, 142-145, 161-164, 185,	
73	Negotiate with customers, vendors or stakeholders to manage expectations, goals and resources					424-434,	380-386, 496-498,		229-237,					476-479,	431-447,	354-355,
74	Present in meetings		318-319, 521-522,			593,				239-242,	641-648, 965-966,					257-258,
75	Facilitate training sessions									128, 232-233,		495, 500,				
76	Run statistic research and analysis on the collected evaluation data								181-190,		359-364,			165-169,		
77	Recommend other instructional or non-instructional interventions using the evaluation data								191-197,		197,			169-170,		
78	Sell ideas, proposals, or expertise to the management								429-433, 454,				598-602,	489,		
79	Comply with participating employee's union regulations and policies												338-347, 523-526,			
80	Recruit and allocate human resources															239-248, 328,
81	Self-motivated, committed and positive											433-439, 546-547,		249-250, 593-594,		437-443,

82	Direct, monitor or act in the audio or video recording				150-152,	353-355,			134-136,		435, 438,	495-498,			205-207, 275,	
83	Deliver instructions and training synchronously or asynchronously		140,									495, 498-499,				
84	Align business goals to instructional objectives		201,				256-261,				94-95, 144-147, 161-162, 188-190, 323-331, 587-593, 793-795, 1120-1122,	440-457, 526-527,				
85	Identify the potentials and limitations of WBI				593-602,	178-180,					94, 104-110, 337-338, 839-844, 917-929,	528,				
86	Get professional certification or recertification								33,			623-627,	40-42,		36-37,	529-532,
87	Analyze the characteristics of the learning environment					199-206,								143-147, 357-359,		
88	Be sensitive to accessibility design													406-411,		
89	Adapt to criticism and changes without taking personally	425-431,	177-183,				322-330,							270-275, 500-505,	532-534,	

90	Set an example by working hard											571-575,			
91	Update knowledge and skill set by going back to school for formal training									43-48,					

APPENDIX H RAW DATA WITH LEVELS OF SUPPORT

No.	Skill Description	001	002	003	004	005	006	007	008	009	010	012	013	014	015	016	Total count
1	Analyze the given data (needs analysis, course requirements, performance analysis, existing content etc.) from customers or stakeholders	2	2	0	0	1	0	1	1	1	3	4	0	2	1	0	18
2	Create relevant learning objectives and corresponding instructional strategies	4	4	0	0	1	1	2	2	0	1	1	2	6	4	5	33
3	Ensure the interface is created and compatible with other media elements	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2
4	Develop and utilize testing and review strategies for quality control	5	6	2	2	1	2	1	1	2	0	4	0	1	3	1	31
5	Create storyboards with descriptions for graphics, audio, video, interaction, and simulation, as well as audio scripts	4	2	2	4	2	1	0	1	2	1	1	0	4	2	1	27
6	Educate, mentor and provide documentations to the team or other related staff about the right procedure	2	1	0	0	3	1	0	0	0	0	0	0	0	1	0	8
7	Revise as necessary based on the feedback from customer(s) or sample audience	4	4	2	2	1	1	0	0	2	1	1	0	3	2	3	26
8	Create a prototype to communicate the look and feel and/or basic functionality	1	1	0	0	1	1	0	0	0	0	0	4	0	0	1	9

9	Accommodate customer's or stakeholder's needs, schedule, style, and culture	2	0	0	3	2	2	0	0	1	2	6	4	0	1	1	24
10	Undertake content research and analysis utilizing existing or public resources	1	1	2	2	2	1	2	2	1	2	1	2	1	2	0	22
11	Build and maintain effective relationship with SMEs, customers or stakeholders, including managing difficult SMEs, customers or stakeholders	2	1	2	4	4	6	1	0	0	0	8	8	1	0	3	40
12	Validate content or strategies by formative or summative evaluation or both with sample audience onsite or remotely	5	0	2	1	1	0	1	1	1	1	3	1	1	4	2	24
13	Deliver and implement the end product (to the customer) in a format or platform appropriate for the learning and management environment	3	0	0	4	1	2	3	1	2	1	2	2	2	2	1	26
14	Develop and implement level 1 and/or level 2 evaluation plans	3	2	4	0	2	2	1	2	2	0	1	0	1	3	2	25
15	Create efficient workflow and platform for internal and external collaboration	4	1	1	3	1	1	1	2	2	5	3	0	3	0	2	29
16	Design and develop appropriate interactivity or instructional activities to allow learners to practice, apply, and engage	2	3	1	4	0	3	0	1	2	1	1	4	5	0	0	27
17	Design visually appealing instructional materials	2	0	0	1	0	1	2	0	1	3	0	1	2	0	0	13
18	Add interesting and fun elements to the learning experience	2	0	0	4	2	1	0	0	0	0	0	3	3	0	0	15

19	Manage budget	1	1	2	1	0	4	0	0	0	0	0	1	0	0	1	11
20	Provide operational templates, other technical specifications, standards, and repository to achieve efficiency and consistency within the team	5	2	0	0	2	1	3	2	0	0	1	0	2	1	0	19
21	Collect, understand and analyze learner characteristics	2	2	0	1	1	0	1	4	2	1	0	4	0	1	0	19
22	Promote and apply instructional principles, theories, and research results to the instructional system design process	2	3	4	0	3	3	4	3	2	8	1	4	2	2	2	43
23	Write and edit text clearly, correctly and appropriately for the target audience	3	3	2	0	5	2	0	1	2	2	2	0	4	0	1	27
24	Pay attention to details	1	2	0	0	0	0	0	0	0	0	1	0	1	0	0	5
25	Lead, manage, and coordinate with team members	10	1	4	1	2	10	0	7	3	2	4	4	8	1	4	61
26	Communicate clearly and effectively in a language understood by developers	3	2	0	1	0	1	2	1	0	1	3	0	6	0	0	20
27	Be creative and innovative	1	0	0	3	1	0	1	1	1	1	0	4	7	1	0	21
28	Ask the right questions to extract information from SMEs and stakeholders	1	3	0	3	3	3	2	1	3	0	0	4	0	1	0	24
29	Be patient	2	0	0	0	1	0	0	0	0	0	0	0	0	0	0	3
30	Study the knowledge of the subject matter with interest and curiosity	1	2	0	1	0	0	0	0	0	0	0	0	2	1	0	7
31	Support and coordinate with the project manager/ manager	2	1	0	1	1	1	0	2	0	0	0	0	0	0	0	8

32	Conduct focus group to assist task analysis	2	0	0	0	0	0	0	1	0	0	0	0	0	0	0	3
33	Chunk or sequence instructional content for a course	2	0	1	3	0	2	0	1	2	0	0	1	2	1	1	16
34	Plan and stage a sign-off or buy-in process with the customer/stakeholders	1	2	0	1	4	3	0	2	0	2	0	2	1	3	6	27
35	Select and partner with the vendor or get support from another team	1	0	3	2	4	6	0	3	0	1	0	1	0	0	1	22
36	Keep track and report on project progress	2	1	2	1	0	3	0	1	1	1	2	4	1	1	3	23
37	Identify the capabilities of commonly available software and tools	2	1	0	2	1	2	1	4	1	2	1	0	5	0	0	22
38	Maintain good computer skills in general	2	2	2	2	0	1	2	1	2	4	0	0	0	1	1	20
39	Respect others and treat them fair and professionally	1	0	1	0	3	5	0	2	0	5	2	1	0	0	1	21
40	Learn and try out emerging technologies and methodologies, be open minded	1	0	1	4	2	3	1	2	3	5	0	4	1	4	2	33
41	Understand the overall business process and objectives	1	0	0	0	0	1	3	2	1	0	1	0	0	0	1	10
42	Educate SMEs and customers/vendors/stakeholders	0	0	1	1	2	1	1	0	0	0	0	4	1	2	3	16
43	Join professional organizations and social groups and attend the meetings and events, physically or virtually	1	1	2	2	2	3	0	1	1	1	2	2	2	1	1	22
44	Read widely on professional discussions and publications	1	2	1	1	0	2	0	2	0	0	1	2	1	1	0	14

45	Network regularly with other professionals	0	0	2	1	1	0	0	0	0	1	0	1	0	0	0	6
46	Develop and implement level 3 and/or level 4 evaluation plans	0	1	0	2	0	0	0	1	0	1	0	2	0	1	0	8
47	Observe and analyze master performers to assist task analysis	0	2	0	2	0	0	0	1	1	0	0	1	0	1	0	8
48	Work with remote team members, SMEs, and customers/vendors/stakeholders	0	1	1	3	0	2	0	3	0	0	0	0	1	0	3	14
49	Determine appropriate technique, technology, and media to support learning objectives and strategies	0	1	2	1	4	1	0	3	4	3	0	5	4	2	3	33
50	Manage time efficiently	1	2	2	2	2	6	0	1	1	4	1	2	3	1	3	31
51	Work on multiple projects at a time	0	2	0	0	0	1	0	0	1	0	0	0	0	0	2	6
52	Organize and archive documents and other materials	1	0	0	0	1	1	0	0	1	0	0	0	1	0	0	5
53	Ensure the instructional content is appropriate in language and culture for global audience and translation	0	2	1	0	1	1	0	0	0	2	0	0	0	0	2	9
54	Identify the needs and performance gap	0	1	3	1	2	0	0	2	1	1	1	0	1	2	1	16
55	Write design documents	2	1	1	2	3	2	1	2	2	2	1	1	1	1	1	23
56	Understand and utilize LMS or other implementation environment for implementation, training management and possibly performance improvement recommendation	0	0	2	0	1	4	1	3	0	2	0	0	1	2	0	16
57	Set up and schedule training sessions	0	0	2	0	0	0	0	0	1	0	0	0	0	0	0	3

58	Administrative registration process	0	0	3	1	0	0	0	0	0	0	0	0	0	0	0	4
59	Organize a set of related content into a curriculum or program	2	0	0	0	1	0	0	1	0	1	0	0	1	0	3	9
60	Write training/business proposals	1	0	0	0	0	0	0	0	0	0	0	0	0	0	1	2
61	Apply message design principles for screen design	0	2	0	1	0	2	0	2	1	1	2	1	2	0	0	14
62	Create and edit graphics and other non-multimedia instructional materials	0	0	2	1	2	0	2	1	1	4	3	3	4	6	1	30
63	Produce and edit animation, video and audio web materials	0	0	0	6	2	0	2	2	1	4	0	4	2	4	1	28
64	Do programming or coding with computer languages	0	0	1	5	0	0	2	1	0	3	1	0	0	2	0	15
65	Collect, establish and disseminate lessons learned and best practices within the team or for one's future work	1	1	2	1	1	0	0	0	0	0	0	0	0	0	0	6
66	Benchmark other organizations	0	0	1	0	0	1	0	1	0	0	0	0	0	0	0	3
67	Evaluate and determine appropriate tools for design and development	0	0	0	3	1	2	2	0	0	0	2	3	3	2	0	18
68	Keep proprietary information confidential and follow the required procedures	0	0	0	2	0	0	0	0	0	0	0	0	0	0	0	2
69	Listen well to understand and translate information for instruction	0	0	0	1	0	0	0	1	0	1	1	0	1	0	0	5
70	Be passionate and enjoy your job	0	0	0	1	2	1	0	2	0	3	0	1	0	1	0	11

71	Work with the combined roles of project manager, instructional designer, instructional developer in a given project	0	0	1	3	2	0	4	0	2	2	0	2	0	1	0	17
72	Create project plans	0	0	0	0	2	1	0	0	0	0	0	2	0	1	5	11
73	Negotiate with customers, vendors or stakeholders to manage expectations, goals and resources	0	0	0	0	1	2	0	1	0	0	0	0	1	1	1	7
74	Present in meetings	0	2	0	0	1	0	0	0	1	2	0	0	0	0	1	7
75	Facilitate training sessions	0	0	0	0	0	0	0	0	2	0	2	0	0	0	0	4
76	Run statistic research and analysis on the collected evaluation data	0	0	0	0	0	0	0	1	0	1	0	0	1	0	0	3
77	Recommend other instructional or non-instructional interventions using the evaluation data	0	0	0	0	0	0	0	1	0	1	0	0	1	0	0	3
78	Sell ideas, proposals, or expertise to the management	0	0	0	0	0	0	0	2	0	0	0	1	0	1	0	4
79	Comply with participating employee's union regulations and policies	0	0	0	0	0	0	0	0	0	0	0	2	0	0	0	2
80	Recruit and allocate human resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2
81	Self-motivated, committed and positive	0	0	0	0	0	0	0	0	0	0	2	0	2	0	1	5
82	Direct, monitor or act in the audio or video recording	0	0	0	1	1	0	0	1	0	2	1	0	0	2	0	8
83	Deliver instructions and training synchronously or asynchronously	0	0	1	0	0	0	0	0	0	0	2	0	0	0	0	3
84	Align business goals to instructional objectives	0	0	1	0	0	0	1	0	0	8	2	0	0	0	0	12

85	Identify the potentials and limitations of WBI	0	0	0	1	1	0	0	0	0	5	1	0	0	0	0	8
86	Get professional certification or recertification	0	0	0	0	0	0	0	0	1	0	1	1	0	1	1	5
87	Analyze the characteristics of the learning environment	0	0	0	0	1	0	0	0	0	0	0	0	2	0	0	3
88	Be sensitive to accessibility design	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	1
89	Adapt to criticism and changes without taking personally	0	1	1	0	0	0	1	0	0	0	0	0	2	1	0	6
90	Set an example by working hard	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	1
91	Update knowledge and skill set by going back to school for formal training	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	1
Total		109	78	73	106	95	110	52	91	64	112	80	106	116	80	82	1354

APPENDIX I MERGED DATA WITH LEVELS OF SUPPORT

Code/No			Skill Description	Skills Count																Skill Total	Cptcy Total	Domain Total
Dom#	Cptcy#	Skill#		#01	#02	#03	#04	#05	#06	#07	#08	#09	#10	#12	#13	#14	#15	#16				
A	A1-1	23	Write and edit text clearly, correctly and appropriately for the target audience	3	3	2	0	5	2	0	1	2	2	2	0	4	0	1	27	108	359	
A	A1-2	26	Communicate clearly and effectively in a language understood by developers	3	2	0	1	0	1	2	1	0	1	3	0	6	0	0	20			
A	A1-3	28	Ask the right questions to extract information from SMEs and stakeholders	1	3	0	3	3	3	2	1	3	0	0	4	0	1	0	24			
A	A1-4	61	Apply message design principles for screen design	0	2	0	1	0	2	0	2	1	1	2	1	2	0	0	14			
A	A1-5	69	Listen well to understand and translate information for instruction	0	0	0	1	0	0	0	1	0	1	1	0	1	0	0	5			
A	A1-6	73	Negotiate with customers, vendors or stakeholders to manage expectations, goals and resources	0	0	0	0	1	2	0	1	0	0	0	0	1	1	1	7			
A	A1-7	74	Present in meetings	0	2	0	0	1	0	0	0	1	2	0	0	0	0	1	7			

A	A1-8	78	Sell ideas, proposals, or expertise to the management	0	0	0	0	0	0	0	0	2	0	0	0	1	0	1	0	4	52
A	A2-1	24	Pay attention to details	1	2	0	0	0	0	0	0	0	0	0	1	0	1	0	0	5	
A	A2-2	29	Be patient	2	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	3	
A	A2-3	39	Respect others and treat them fair and professionally	1	0	1	0	3	5	0	2	0	5	2	1	0	0	1	21		
A	A2-4	70	Be passionate and enjoy your job	0	0	0	1	2	1	0	2	0	3	0	1	0	1	0	11		
A	A2-5	81	Self-motivated, committed and positive	0	0	0	0	0	0	0	0	0	0	2	0	2	0	1	5		
A	A2-6	89	Adapt to criticism and changes without taking personally	0	1	1	0	0	0	1	0	0	0	0	0	2	1	0	6		
A	A2-7	90	Set an example by working hard	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	1		

A	A3-1	22	Promote and apply instructional principles, theories, and research results to the instructional system design process	2	3	4	0	3	3	4	3	2	8	1	4	2	2	2	43	57
A	A3-2	44	Read widely on professional discussions and publications	1	2	1	1	0	2	0	2	0	0	1	2	1	1	0	14	
A	A4-1	27	Be creative and innovative	1	0	0	3	1	0	1	1	1	1	0	4	7	1	0	21	115
A	A4-2	30	Study the knowledge of the subject matter with interest and curiosity	1	2	0	1	0	0	0	0	0	0	0	0	2	1	0	7	
A	A4-3	38	Maintain good computer skills in general	2	2	2	2	0	1	2	1	2	4	0	0	0	1	1	20	
A	A4-4	40	Learn and try out emerging technologies and methodologies, be open minded	1	0	1	4	2	3	1	2	3	5	0	4	1	4	2	33	
A	A4-5	43	Join professional organizations and social groups and attend the meetings and events, physically or virtually	1	1	2	2	2	3	0	1	1	1	2	2	2	1	1	22	
A	A4-6	45	Network regularly with other professionals	0	0	2	1	1	0	0	0	0	1	0	1	0	0	0	6	

A	A4-7	86	Get professional certification or recertification	0	0	0	0	0	0	0	0	0	1	0	1	1	0	1	1	5	
A	A4-8	91	Update knowledge and skill set by going back to school for formal training	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	1	
A	A5-1	68	Keep proprietary information confidential and follow the required procedures	0	0	0	2	0	0	0	0	0	0	0	0	0	0	0	0	2	4
A	A5-2	79	Comply with participating employee's union regulations and policies	0	0	0	0	0	0	0	0	0	0	0	0	2	0	0	0	2	
A	A6-1	51	Work on multiple projects at a time	0	2	0	0	0	1	0	0	1	0	0	0	0	0	0	2	6	23
A	A6-2	71	Work with the combined roles of project manager, instructional designer, instructional developer in a given project	0	0	1	3	2	0	4	0	2	2	0	2	0	1	0	17		
B	B1-1	1	Analyze the given data (needs analysis, course requirements, performance analysis, existing content etc.) from customers or stakeholders	2	2	0	0	1	0	1	1	1	1	3	4	0	2	1	0	18	46
B	B1-2	54	Identify the needs and performance gap	0	1	3	1	2	0	0	2	1	1	1	0	1	2	1	16		
																				207	

B	B1-3	84	Align business goals to instructional objectives	0	0	1	0	0	0	1	0	0	8	2	0	0	0	0	12	
B	B2-1	21	Collect, understand and analyze learner characteristics	2	2	0	1	1	0	1	4	2	1	0	4	0	1	0	19	22
B	B2-2	87	Analyze the characteristics of the learning environment	0	0	0	0	1	0	0	0	0	0	0	0	2	0	0	3	
B	B3-1	10	Undertake content research and analysis utilizing existing or public resources	1	1	2	2	2	1	2	2	1	2	1	2	1	2	0	22	58
B	B3-2	32	Conduct focus group to assist task analysis	2	0	0	0	0	0	0	1	0	0	0	0	0	0	0	3	
B	B3-3	33	Chunk or sequence instructional content for a course	2	1	0	3	0	2	0	1	2	0	0	1	2	1	1	16	
B	B3-4	47	Observe and analyze master performers to assist task analysis	0	2	0	2	0	0	0	1	1	0	0	1	0	1	0	8	
B	B3-5	59	Organize a set of related content into a curriculum or program	2	0	0	0	1	0	0	1	0	1	0	0	1	0	3	9	

B	B4-1	37	Identify the capabilities of commonly available software and tools	2	1	0	2	1	2	1	4	1	2	1	0	5	0	0	22	81	
B	B4-2	49	Determine appropriate technique, technology, and media to support learning objectives and strategies	0	1	1	2	4	1	0	3	4	3	0	5	4	2	3	33		
B	B4-3	67	Evaluate and determine appropriate tools for design and development	0	0	0	3	1	2	2	0	0	0	2	3	3	2	0	18		
B	B4-4	85	Identify the potentials and limitations of WBI	0	0	0	1	1	0	0	0	0	5	1	0	0	0	0	8		
C	C1-1	2	Create relevant learning objectives and corresponding instructional strategies	4	4	0	0	1	1	2	2	0	1	1	2	6	4	5	33	88	360
C	C1-2	16	Design and develop appropriate interactivity or instructional activities to allow learners to practice, apply, and engage	2	3	1	4	0	3	0	1	2	1	1	4	5	0	0	27		
C	C1-3	17	Design visually appealing instructional materials	2	0	0	1	0	1	2	0	1	3	0	1	2	0	0	13		
C	C1-4	18	Add interesting and fun elements to the learning experience	2	0	0	4	2	1	0	0	0	0	0	3	3	0	0	15		

C	C2-1	4	Develop and utilize testing and review strategies for quality control	5	6	2	2	1	2	1	1	2	0	4	0	1	3	1	31	81
C	C2-2	5	Create storyboards with descriptions for graphics, audio, video, interaction, and simulation, as well as audio scripts	4	2	2	4	2	1	0	1	2	1	1	0	4	2	1	27	
C	C2-3	55	Write design documents	2	1	1	2	3	2	1	2	2	2	1	1	1	1	1	23	
C	C3-1	3	Ensure the interface is created and compatible with other media elements	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	118
C	C3-2	7	Revise as necessary based on the feedback from customer(s) or sample audience	4	4	2	2	1	1	0	0	2	1	1	0	3	2	3	26	
C	C3-3	8	Create a prototype to communicate the look and feel and/or basic functionality	1	1	0	0	1	1	0	0	0	0	0	4	0	0	1	9	
C	C3-4	62	Create and edit graphics and other non-multimedia instructional materials	0	0	2	1	2	0	2	1	1	4	3	3	4	6	1	30	
C	C3-5	63	Produce and edit animation, video and audio web materials	0	0	0	6	2	0	2	2	1	4	0	4	2	4	1	28	

C	C3-6	64	Do programming or coding with computer languages	0	0	1	5	0	0	2	1	0	3	1	0	0	2	0	15
C	C3-7	82	Direct, monitor or act in the audio or video recording	0	0	0	1	1	0	0	1	0	2	1	0	0	2	0	8
C	C4-1	12	Validate content or strategies by formative or summative evaluation or both with sample audience onsite or remotely	5	0	2	1	1	0	1	1	1	1	3	1	1	4	2	24
C	C4-2	14	Develop and implement level 1 and/or level 2 evaluation plans	3	2	4	0	2	2	1	2	2	0	1	0	1	3	2	25
C	C4-3	46	Develop and implement level 3 and/or level 4 evaluation plans	0	1	0	2	0	0	0	1	0	1	0	2	0	1	0	8
C	C4-4	76	Run statistic research and analysis on the collected evaluation data	0	0	0	0	0	0	0	1	0	1	0	0	1	0	0	3
C	C4-5	77	Recommend other instructional or non-instructional interventions using the evaluation data	0	0	0	0	0	0	0	1	0	1	0	0	1	0	0	3
C	C5-1	53	Ensure the instructional content is appropriate in language and culture for global audience and translation	0	2	1	0	1	1	0	0	0	2	0	0	0	0	2	9
																			63
																			10

C	C5-2	88	Be sensitive to accessibility design	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	1		
D	D1-1	13	Deliver and implement the end product (to the customer) in a format or platform appropriate for the learning and management environment	3	0	0	4	1	2	3	1	2	1	2	2	2	2	2	1	26	56	428
D	D1-2	56	Understand and utilize LMS or other implementation environment for implementation, training management and possibly performance improvement recommendation	0	0	2	0	1	4	1	3	0	2	0	0	1	2	0	16			
D	D1-3	57	Set up and schedule training sessions	0	0	2	0	0	0	0	0	1	0	0	0	0	0	0	3			
D	D1-4	58	Administrate registration process	0	0	3	1	0	0	0	0	0	0	0	0	0	0	0	4			
D	D1-5	75	Facilitate training sessions	0	0	0	0	0	0	0	0	2	0	2	0	0	0	0	4			
D	D1-6	83	Deliver instructions and training synchronously or asynchronously	0	0	1	0	0	0	0	0	0	0	2	0	0	0	0	3			
D	D2-1	19	Manage budget	1	1	2	1	0	4	0	0	0	0	0	1	0	0	1	11	201		

D	D2-2	25	Lead, manage, and coordinate with team members	10	1	4	1	2	10	0	7	3	2	4	4	8	1	4	61
D	D2-3	31	Support and coordinate with the project manager/ manager	2	1	0	1	1	1	0	2	0	0	0	0	0	0	0	8
D	D2-4	34	Plan and stage a sign-off or buy-in process with the customer/stakeholders	1	2	0	1	4	3	0	2	0	2	0	2	1	3	6	27
D	D2-5	35	Select and partner with the vendor or get support from another team	1	0	3	2	4	6	0	3	0	1	0	1	0	0	1	22
D	D2-6	36	Keep track and report on project progress	2	1	2	1	0	3	0	1	1	1	2	4	1	1	3	23
D	D2-7	50	Manage time efficiently	1	2	2	2	2	6	0	1	1	4	1	2	3	1	3	31
D	D2-8	52	Organize and archive documents and other materials	1	0	0	0	1	1	0	0	1	0	0	0	1	0	0	5
D	D2-9	72	Create project plans	0	0	0	0	2	1	0	0	0	0	0	2	0	1	5	11

D	D2-10	80	Recruit and allocate human resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2	
D	D3-1	6	Educate, mentor and provide documentations to the team or other related staff about the right procedure	2	1	0	0	3	1	0	0	0	0	0	0	0	1	0	8	76
D	D3-2	15	Create efficient workflow and platform for internal and external collaboration	4	1	1	3	1	1	1	2	2	5	3	0	3	0	2	29	
D	D3-3	20	Provide operational templates, other technical specifications, standards, and repository to achieve efficiency and consistency within the team	5	2	0	0	2	1	3	2	0	0	1	0	2	1	0	19	
D	D3-4	48	Work with remote team members, SMEs, and customers/vendors/stakeholders	0	1	1	3	0	2	0	3	0	0	0	0	1	0	3	14	
D	D3-5	65	Collect, establish and disseminate lessons learned and best practices within the team or for one's future work	1	1	2	1	1	0	0	0	0	0	0	0	0	0	0	6	
D	D4-1	9	Accommodate customer's or stakeholder's needs, schedule, style, and culture	2	0	0	3	2	2	0	0	1	2	6	4	0	1	1	24	80
D	D4-2	11	Build and maintain effective relationship with SMEs, customers or stakeholders, including managing difficult SMEs, customers or stakeholders	2	1	2	4	4	6	1	0	0	0	8	8	1	0	3	40	

D	D4-3	42	Educate SMEs and customers/vendors/stakeholders	0	0	1	1	2	1	1	0	0	0	0	4	1	2	3	16		
D	D5-1	41	Understand the overall business process and objectives	1	0	0	0	0	1	3	2	1	0	1	0	0	0	1	10	15	
D	D5-2	60	Write training/business proposals	1	0	0	0	0	0	0	0	0	0	0	0	0	0	1	2		
D	D5-3	66	Benchmark other organizations	0	0	1	0	0	1	0	1	0	0	0	0	0	0	0	3		
				109	79	71	107	95	110	52	91	64	112	80	106	116	80	82	1354	1354	1354

APPENDIX J THE COMPETENCY SURVEY AT ZOOMERANG

Competencies for Expert Instructional
Designers in WBI

Welcome to My Survey!

This survey has 13 questions, takes 5-10 minutes.

Copyright 2012

Yonghui Chen

Aka Susan Chen

Wayne State University

Start

Questions marked with an asterisk (*) are mandatory.

1. * **Research Informed Consent**

Purpose

In this research study, the researcher is to identify and rate the competencies for expert instructional designers who specialize in Web Based Instruction.

Study Procedures

If you take part in the study, you will be asked questions concerning your opinions on instructional competencies. The survey will be anonymous, unless you are willing to give your name and other personal information.

- You will be asked to rate the importance of each listed competency. Those competencies have been compiled out of the preceding interview results.
- You are encouraged to answer all questions. However, you have the option of not answering some of the questions and remaining in the study.

Benefits

As a participant in this research study, there will be no direct benefit for you; however, information from this study may benefit other people and society now or in the future.

Risks

There are no known risks at this time to participation in this study.

Study Costs

Participation in this study will be of no cost to you.

Compensation

You will not be paid for taking part in this study.

Confidentiality

All information collected about you during the course of this study will be kept confidential to the extent permitted by law. You will be identified in the research records by a code name or number. Information that identifies you personally will not be released without your written permission. However, the study sponsor, the Institutional Review Board at Wayne State University, or federal agencies with appropriate regulatory oversight [e.g., Food and Drug Administration, Office for Human Research Protections, Office of Civil Rights etc. may review your records.

When the results of this research are published or discussed in conferences, no information will be included that would reveal your identity.

You will be identified in the research records by a code name or number, if you choose to identify yourself during the survey.

Voluntary Participation/Withdrawal

Taking part in this study is voluntary. You have the right to choose not to take part in this study. If you decide to take part in the study you can later change your mind and withdraw from the study. You are free to only answer questions that you want to answer. You are free to withdraw from participation in this study at any time. Your decisions will not change any present or future relationship with Wayne State University or its affiliates, or other services you are entitled to receive.

The researcher may stop your participation in this study without your consent. The researcher will make the decision and let you know if it is not possible for you to continue. The decision that is made is to protect your health and safety, or because you did not follow the instructions to take part in the study.

Questions

If you have any questions about this study now or in the future, you may contact Yonghui Chen or one of her research advisers at the following phone number 248-935-7946 or 313-577- 1700. If you have questions or concerns about your rights as a research participant, the Chair of the Human Investigation Committee can be contacted at (313) 577-1628. If you are unable to contact the research staff, or if you want to talk to someone other than the research staff, you may also call (313) 577-1628 to ask questions or voice concerns or complaints.

I agree to participate in this survey

I do not agree to participate in this survey

Submit

Questions marked with an asterisk (*) are mandatory.

2. * Are you an instructional designer who was or is working in the Web Based Instruction (WBI) field, with a U.S.A. based business or employment?

Yes

No

3. * Did you take this survey before? Or, were you in the interview group of this research?

Yes

No

Submit

4. What's your current job title?

5. What's your age range?

25-35

36-45

46-55

55 above

6. Your gender:

Male

Female

7. The nature of the organization/business you are current working for:

Business/Industry

Education

Government/Military

Health Care

Independent Consultant

Other

8. What's your highest education level?

Bachelor's

Master's

Doctorate

Not applicable

9. What's the major of your last degree?

Submit

10. How many years have you worked in web based instruction as an instructional designer? (User numeric number only)

11. How many employees are there in your organization?

<100

101-500

501-1,000

1,001-2,500

2,501-10,000

>10,000

Submit

12. Below is the list of competencies a typical expert WBI instructional designer has. Apply your perception of expectations for such experts. It is important to focus on the **expertise needed for Web Based Instruction**.

Use the scale of 1-5 to indicate the level of importance. Select only one level for each competency.

	Not Important	Slightly Important	Important	Very Important	Most Important
Communicate effectively, in visual, oral, and written formats	1	2	3	4	5
Build trust with others by acting positively, respectfully, and diligently	1	2	3	4	5
Apply research results and instructional theories to the practice of Web-based instructional design	1	2	3	4	5
Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction	1	2	3	4	5
Identify and comply with legal, ethical, and regulatory requirements	1	2	3	4	5
Successfully complete multiple tasks and responsibilities	1	2	3	4	5
Conduct a needs assessment pertinent to the goals of the Web-based instruction	1	2	3	4	5
Analyze the characteristics of the target audience	1	2	3	4	5
Conduct task analysis and content analysis	1	2	3	4	5
Analyze the characteristics of available technologies and tools for the Web-based instruction project	1	2	3	4	5
Determine appropriate instructional strategies and techniques	1	2	3	4	5
Design instructional materials for development	1	2	3	4	5
Develop instructional materials	1	2	3	4	5
Evaluate and assess the Web-based instruction and its impact	1	2	3	4	5
Design instruction to be appropriate for global usage	1	2	3	4	5

Deliver and implement end products	1	2	3	4	5
Plan and implement assignments and resources to achieve project goals	1	2	3	4	5
Promote efficiency and effectiveness for internal and external collaboration	1	2	3	4	5
Manage relationship with Subject Matter Experts (SMEs), customers, or stakeholders	1	2	3	4	5
Apply business acumen to build a business case for the organization's instructional programs	1	2	3	4	5

Submit

13. This is the end of the survey. If you wish to receive the results of this research, please provide your email below.

Please also use this field to provide any additional information you have for us. Thanks!

Submit

**APPENDIX K-1 COMPETENCIES AND PERFORMANCE STATEMENTS BY
BUSINESS SETTINGS**

(N=15)

Competency	Business Setting									
	Gov/Mil		Bus/Ind		Edu		Hlthcr		Indpdt	
	L.S.	%	L.S.	%	L.S.	%	L.S.	%	L.S.	%
Professional Foundations										
1. Communicate effectively, in visual, oral, and written formats										
• Write and edit text clearly, correctly and appropriately for the target audience	3	11	18	67	2	7	4	15	0	0
• Communicate clearly and effectively in a language understood by developers	3	15	7	35	3	15	6	30	1	5
• Ask the right questions to extract information from SMEs and stakeholders	1	4	20	83	0	0	0	0	3	13
• Apply message design principles for screen design	0	0	9	64	2	14	2	14	1	7
• Listen well to understand and translate information for instruction	0	0	2	40	1	20	1	20	1	20
• Negotiate with customers, vendors or stakeholders to manage expectations, goals and resources	0	0	6	86	0	0	1	14	0	0
• Present in meetings	0	0	7	100	0	0	0	0	0	0
• Sell ideas, proposals, or expertise to the management	0	0	4	100	0	0	0	0	0	0
2. Build trust with others by acting positively, respectfully, and diligently										
• Pay attention to details	1	20	2	40	1	20	1	20	0	0
• Be patient	2	67	1	33	0	0	0	0	0	0
• Respect others and treat them fair and professionally	1	5	18	86	2	10	0	0	0	0

• Be passionate and enjoy your job	0	0	10	91	0	0	0	0	1	9
• Self-motivated, committed and positive	0	0	1	20	2	40	2	40	0	0
• Adapt to criticism and changes without taking personally	0	0	4	67	0	0	2	33	0	0
• Set an example by working hard	0	0	1	100	0	0	0	0	0	0
3. Apply research results and instructional theories to the practice of Web-based instructional design										
• Promote and apply instructional principles, theories, and research results to the instructional system design process	2	5	38	88	1	2	2	5	0	0
• Read widely on professional discussions and publications	1	7	10	71	1	7	1	7	1	7
4. Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction										
• Be creative and innovative	1	5	10	48	0	0	7	33	3	14
• Study the knowledge of the subject matter with interest and curiosity	1	14	3	43	0	0	2	29	1	14
• Maintain good computer skills in general	2	10	16	80	0	0	0	0	2	10
• Learn and try out emerging technologies and methodologies, be open minded	1	3	27	82	0	0	1	3	4	12
• Join professional organizations and social groups and attend the meetings and events, physically or virtually	1	5	15	68	2	9	2	9	2	9
• Network regularly with other professionals	0	0	5	83	0	0	0	0	1	17
• Get professional certification or recertification	0	0	4	80	1	20	0	0	0	0

<ul style="list-style-type: none"> Update knowledge and skill set by going back to school for formal training 	0	0	1	100	0	0	0	0	0	0
5. Identify and comply with legal, ethical, and regulatory requirements										
<ul style="list-style-type: none"> Keep proprietary information confidential and follow the required procedures 	0	0	0	0	0	0	0	0	2	100
<ul style="list-style-type: none"> Comply with participating employee's union regulations and policies 	0	0	2	100	0	0	0	0	0	0
6. Successfully complete multiple tasks and responsibilities										
<ul style="list-style-type: none"> Work on multiple projects at a time 	0	0	6	100	0	0	0	0	0	0
<ul style="list-style-type: none"> Work with the combined roles of project manager, instructional designer, instructional developer in a given project 	0	0	14	82	0	0	0	0	3	18
Planning & Analysis										
7. Conduct a needs assessment pertinent to the goals of the Web-based instruction										
<ul style="list-style-type: none"> Analyze the given data (needs analysis, course requirements, performance analysis, existing content etc.) from customers or stakeholder 	2	11	10	56	4	22	2	11	0	0
<ul style="list-style-type: none"> Identify the needs and performance gap 	0	0	13	81	1	6	1	6	1	6
<ul style="list-style-type: none"> Align business goals to instructional objectives 	0	0	10	83	2	17	0	0	0	0
8. Analyze the characteristics of the target audience										
<ul style="list-style-type: none"> Collect, understand and analyze learner characteristics 	2	11	16	84	0	0	0	0	1	5
<ul style="list-style-type: none"> Analyze the characteristics of the learning environment 	0	0	1	33	0	0	2	67	0	0

9. Conduct task analysis and content analysis										
• Undertake content research and analysis utilizing existing or public resources	1	5	17	77	1	5	1	5	2	9
• Conduct focus group to assist task analysis	2	67	1	33	0	0	0	0	0	0
• Chunk or sequence instructional content for a course	2	13	9	56	0	0	2	13	3	19
• Observe and analyze master performers to assist task analysis	0	0	6	75	0	0	0	0	2	25
• Organize a set of related content into a curriculum or program	2	22	6	67	0	0	1	11	0	0
10. Analyze the characteristics of available technologies and tools for the Web-based instruction project										
• Identify the capabilities of commonly available software and tools	2	9	12	55	1	5	5	23	2	9
• Determine appropriate technique, technology, and media to support learning objectives and strategies	0	0	27	82	0	0	4	12	2	6
• Evaluate and determine appropriate tools for design and development	0	0	10	56	2	11	3	17	3	17
• Identify the potentials and limitations of WBI	0	0	6	75	1	13	0	0	1	13
Design & Development										
11. Determine appropriate instructional strategies and techniques										
• Create relevant learning objectives and corresponding instructional strategies	4	12	22	67	1	3	6	18	0	0
• Design and develop appropriate interactivity or instructional activities to allow learners to practice, apply, and engage	2	7	15	56	1	4	5	19	4	15

• Design visually appealing instructional materials	2	15	8	62	0	0	2	15	1	8
• Add interesting and fun elements to the learning experience	2	13	6	40	0	0	3	20	4	27
12. Design instructional materials for development										
• Develop and utilize testing and review strategies for quality control	5	16	19	61	4	13	1	3	2	6
• Create storyboards with descriptions for graphics, audio, video, interaction, and simulation, as well as audio scripts	4	15	14	52	1	4	4	15	4	15
• Write design documents	2	9	17	74	1	4	1	4	2	9
13. Develop instructional materials										
• Ensure the interface is created and compatible with other media elements	2	100	0	0	0	0	0	0	0	0
• Revise as necessary based on the feedback from customer(s) or sample audience	4	15	16	62	1	4	3	12	2	8
• Create a prototype to communicate the look and feel and/or basic functionality	1	11	8	89	0	0	0	0	0	0
• Create and edit graphics and other non-multimedia instructional materials	0	0	22	73	3	10	4	13	1	3
• Produce and edit animation, video and audio Web materials	0	0	20	71	0	0	2	7	6	21
• Do programming or coding with computer languages	0	0	9	60	1	7	0	0	5	33
• Direct, monitor or act in the audio or video recording	0	0	6	75	1	13	0	0	1	13
14. Evaluate and assess the Web-based instruction and its impact										
• Validate content or strategies by formative or summative	5	21	14	58	3	13	1	4	1	4

evaluation or both with sample audience onsite or remotely										
<ul style="list-style-type: none"> Develop and implement level 1 and/or level 2 evaluation plans 	3	12	20	80	1	4	1	4	0	0
<ul style="list-style-type: none"> Develop and implement level 3 and/or level 4 evaluation plans 	0	0	6	75	0	0	0	0	2	25
<ul style="list-style-type: none"> Run statistic research and analysis on the collected evaluation data 	0	0	2	67	0	0	1	33	0	0
<ul style="list-style-type: none"> Recommend other instructional or non-instructional interventions using the evaluation data 	0	0	2	67	0	0	1	33	0	0
15. Design instruction to be appropriate for global usage										
<ul style="list-style-type: none"> Ensure the instructional content is appropriate in language and culture for global audience and translation 	0	0	9	100	0	0	0	0	0	0
<ul style="list-style-type: none"> Be sensitive to accessibility design 	0	0	0	0	0	0	1	100	0	0
Implementation & Management										
16. Deliver and implement end products										
<ul style="list-style-type: none"> Deliver and implement the end product (to the customer) in a format or platform appropriate for the learning and management environment 	3	12	15	58	2	8	2	8	4	15
<ul style="list-style-type: none"> Understand and utilize LMS or other implementation environment for implementation, training management and possibly performance improvement recommendation 	0	0	15	94	0	0	1	6	0	0

• Set up and schedule training sessions	0	0	3	100	0	0	0	0	0	0
• Administrate registration process	0	0	3	75	0	0	0	0	1	25
• Facilitate training sessions	0	0	2	50	2	50	0	0	0	0
• Deliver instructions and training synchronously or asynchronously	0	0	1	33	2	67	0	0	0	0
17. Plan and implement assignments and resources to achieve project goals										
• Manage budget	1	9	9	82	0	0	0	0	1	9
• Lead, manage, and coordinate with team members	10	16	38	62	4	7	8	13	1	2
• Support and coordinate with the project manager/ manager	2	25	5	63	0	0	0	0	1	13
• Plan and stage a sign-off or buy-in process with the customer/stakeholders	1	4	24	89	0	0	1	4	1	4
• Select and partner with the vendor or get support from another team	1	5	19	86	0	0	0	0	2	9
• Keep track and report on project progress	2	9	17	74	2	9	1	4	1	4
• Manage time efficiently	1	3	24	77	1	3	3	10	2	6
• Organize and archive documents and other materials	1	20	3	60	0	0	1	20	0	0
• Create project plans	0	0	11	100	0	0	0	0	0	0
• Recruit and allocate human resources	0	0	2	100	0	0	0	0	0	0
18. Promote efficiency and effectiveness for internal and external collaboration										
• Educate, mentor and provide documentations to the team or other related staff about the right procedure	2	25	6	75	0	0	0	0	0	0
• Create efficient workflow and platform for internal and external	4	14	16	55	3	10	3	10	3	10

collaboration										
<ul style="list-style-type: none"> Provide operational templates, other technical specifications, standards, and repository to achieve efficiency and consistency within the team 	5	26	11	58	1	5	2	11	0	0
<ul style="list-style-type: none"> Work with remote team members, SMEs, and customers/vendors/stakeholders 	0	0	10	71	0	0	1	7	3	21
<ul style="list-style-type: none"> Collect, establish and disseminate lessons learned and best practices within the team or for one's future work 	1	17	4	67	0	0	0	0	1	17
19. Manage relationship with Subject Matter Experts (SMEs), customers, or stakeholders										
<ul style="list-style-type: none"> Accommodate customer's or stakeholder's needs, schedule, style, and culture 	2	8	13	54	6	25	0	0	3	13
<ul style="list-style-type: none"> Build and maintain effective relationship with SMEs, customers or stakeholders, including managing difficult SMEs, customers or stakeholders 	2	5	25	63	8	20	1	3	4	10
<ul style="list-style-type: none"> Educate SMEs and customers/vendors/stakeholders 	0	0	14	88	0	0	1	6	1	6
20. Apply business acumen to build a business case for the organization's instructional programs										
<ul style="list-style-type: none"> Understand the overall business process and objectives 	1	10	8	80	1	10	0	0	0	0
<ul style="list-style-type: none"> Write training/business proposals 	1	50	1	50	0	0	0	0	0	0
<ul style="list-style-type: none"> Benchmark other organizations 	0	0	3	100	0	0	0	0	0	0

**APPENDIX K-2 COMPETENCIES AND PERFORMANCE STATEMENTS BY
BUSINESS SIZE**

(N=15)

Competency	Business Size					
	Large		Medium		Small	
	L.S.	%	L.S.	%	L.S.	%
Professional Foundations						
1. Communicate effectively, in visual, oral, and written formats						
• Write and edit text clearly, correctly and appropriately for the target audience	17	63	7	26	3	11
• Communicate clearly and effectively in a language understood by developers	11	55	630		3	15
• Ask the right questions to extract information from SMEs and stakeholders	10	42	8	33	6	25
• Apply message design principles for screen design	6	43	5	36	3	21
• Listen well to understand and translate information for instruction	3	60	1	20	1	20
• Negotiate with customers, vendors or stakeholders to manage expectations, goals and resources	4	57	3	43	0	0
• Present in meetings	3	43	2	29	2	29
• Sell ideas, proposals, or expertise to the management	4	100	0	0	0	0
2. Build trust with others by acting positively, respectfully, and diligently						
• Pay attention to details	2	40	1	20	2	40
• Be patient	3	100	0	0	0	0
• Respect others and treat them fair and professionally	13	62	8	38	0	0
• Be passionate and enjoy your job	9	82	1	9	1	9
• Self-motivated, committed and positive	2	40	3	60	0	0
• Adapt to criticism and changes without taking personally	4	67	1	17	1	17
• Set an example by working	1	100	0	0	0	0

hard						
3. Apply research results and instructional theories to the practice of Web-based instructional design						
<ul style="list-style-type: none"> Promote and apply instructional principles, theories, and research results to the instructional system design process 	28	65	12	28	3	7
<ul style="list-style-type: none"> Read widely on professional discussions and publications 	8	57	3	21	3	21
4. Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction						
<ul style="list-style-type: none"> Be creative and innovative 	16	76	2	10	3	14
<ul style="list-style-type: none"> Study the knowledge of the subject matter with interest and curiosity 	4	57	0	0	3	43
<ul style="list-style-type: none"> Maintain good computer skills in general 	10	50	6	30	4	20
<ul style="list-style-type: none"> Learn and try out emerging technologies and methodologies, be open minded 	20	61	9	27	4	12
<ul style="list-style-type: none"> Join professional organizations and social groups and attend the meetings and events, physically or virtually 	12	55	7	32	3	14
<ul style="list-style-type: none"> Network regularly with other professionals 	3	83	0	0	1	17
<ul style="list-style-type: none"> Get professional certification or recertification 	2	40	3	60	0	0
<ul style="list-style-type: none"> Update knowledge and skill set by going back to school for formal training 	1	100	0	0	0	0
5. Identify and comply with legal, ethical, and regulatory requirements						
<ul style="list-style-type: none"> Keep proprietary information confidential and follow the required procedures 	0	0	0	0	2	100
<ul style="list-style-type: none"> Comply with participating employee's union regulations and policies 	2	100	0	0	0	0
6. Successfully complete multiple tasks and responsibilities						

<ul style="list-style-type: none"> Work on multiple projects at a time 	0	0	4	67	2	33
<ul style="list-style-type: none"> Work with the combined roles of project manager, instructional designer, instructional developer in a given project 	8	47	6	35	3	18
Planning & Analysis						
7. Conduct a needs assessment pertinent to the goals of the Web-based instruction						
<ul style="list-style-type: none"> Analyze the given data (needs analysis, course requirements, performance analysis, existing content etc.) from customers or stakeholder 	10	56	6	33	2	11
<ul style="list-style-type: none"> Identify the needs and performance gap 	11	69	3	19	2	13
<ul style="list-style-type: none"> Align business goals to instructional objectives 	9	75	3	25	0	0
8. Analyze the characteristics of the target audience						
<ul style="list-style-type: none"> Collect, understand and analyze learner characteristics 	13	68	3	16	3	16
<ul style="list-style-type: none"> Analyze the characteristics of the learning environment 	3	100	0	0	0	0
9. Conduct task analysis and content analysis						
<ul style="list-style-type: none"> Undertake content research and analysis utilizing existing or public resources 	14	64	5	23	3	14
<ul style="list-style-type: none"> Conduct focus group to assist task analysis 	3	100	0	0	0	0
<ul style="list-style-type: none"> Chunk or sequence instructional content for a course 	7	44	5	31	4	25
<ul style="list-style-type: none"> Observe and analyze master performers to assist task analysis 	3	38	1	13	4	50
<ul style="list-style-type: none"> Organize a set of related content into a curriculum or program 	6	67	3	33	0	0
10. Analyze the characteristics of available technologies and tools for the Web-based instruction project						
<ul style="list-style-type: none"> Identify the capabilities of commonly available software and tools 	14	64	5	23	3	14

• Determine appropriate technique, technology, and media to support learning objectives and strategies	22	67	3	33	0	0
• Evaluate and determine appropriate tools for design and development	9	50	6	33	3	17
• Identify the potentials and limitations of WBI	6	75	1	13	1	15
Design & Development						
11. Determine appropriate instructional strategies and techniques						
• Create relevant learning objectives and corresponding instructional strategies	20	61	9	27	4	12
• Design and develop appropriate interactivity or instructional activities to allow learners to practice, apply, and engage	14	52	6	22	7	26
• Design visually appealing instructional materials	8	62	4	31	1	8
• Add interesting and fun elements to the learning experience	10	67	1	7	4	27
12. Design instructional materials for development						
• Develop and utilize testing and review strategies for quality control	13	42	10	32	8	26
• Create storyboards with descriptions for graphics, audio, video, interaction, and simulation, as well as audio scripts	16	59	5	19	6	22
• Write design documents	13	57	7	30	3	13
13. Develop instructional materials						
• Ensure the interface is created and compatible with other media elements	2	100	0	0	0	0
• Revise as necessary based on the feedback from customer(s) or sample audience	13	50	7	27	6	23
• Create a prototype to communicate the look and feel and/or basic functionality	6	67	2	22	1	11

• Create and edit graphics and other non-multimedia instructional materials	22	73	7	23	1	3
• Produce and edit animation, video and audio Web materials	18	64	4	14	6	21
• Do programming or coding with computer languages	7	47	3	20	5	33
• Direct, monitor or act in the audio or video recording	6	75	1	13	1	13
14. Evaluate and assess the Web-based instruction and its impact						
• Validate content or strategies by formative or summative evaluation or both with sample audience onsite or remotely	16	67	7	29	1	4
• Develop and implement level 1 and/or level 2 evaluation plans	15	60	8	32	2	8
• Develop and implement level 3 and/or level 4 evaluation plans	5	63	0	0	3	38
• Run statistic research and analysis on the collected evaluation data	3	100	0	0	0	0
• Recommend other instructional or non-instructional interventions using the evaluation data	3	100	0	0	0	0
15. Design instruction to be appropriate for global usage						
• Ensure the instructional content is appropriate in language and culture for global audience and translation	4	44	3	33	2	22
• Be sensitive to accessibility design	1	100	0	0	0	0
Implementation & Management						
16. Deliver and implement end products						
• Deliver and implement the end product (to the customer) in a format or platform appropriate for the learning and management environment	12	46	10	38	4	15
• Understand and utilize LMS or other implementation	11	69	5	31	0	0

environment for implementation, training management and possibly performance improvement recommendation						
• Set up and schedule training sessions	2	67	1	33	0	0
• Administrate registration process	3	75	0	0	1	25
• Facilitate training sessions	0	0	4	100	0	0
• Deliver instructions and training synchronously or asynchronously	1	33	2	67	0	0
17. Plan and implement assignments and resources to achieve project goals						
• Manage budget	4	36	5	45	2	18
• Lead, manage, and coordinate with team members	38	62	21	34	2	3
• Support and coordinate with the project manager/ manager	5	63	1	13	2	25
• Plan and stage a sign-off or buy-in process with the customer/stakeholders	15	56	9	33	3	11
• Select and partner with the vendor or get support from another team	13	59	7	32	2	9
• Keep track and report on project progress	12	52	9	39	2	9
• Manage time efficiently	16	52	11	35	4	13
• Organize and archive documents and other materials	3	60	2	40	0	0
• Create project plans	5	45	6	55	0	0
• Recruit and allocate human resources	0	0	2	100	0	0
18. Promote efficiency and effectiveness for internal and external collaboration						
• Educate, mentor and provide documentations to the team or other related staff about the right procedure	6	75	1	13	1	13
• Create efficient workflow and platform for internal and external collaboration	16	55	9	31	4	14
• Provide operational templates, other technical	12	63	5	26	2	11

specifications, standards, and repository to achieve efficiency and consistency within the team						
<ul style="list-style-type: none"> • Work with remote team members, SMEs and customers/vendors/stakeholders 	5	36	5	36	4	29
<ul style="list-style-type: none"> • Collect, establish and disseminate lessons learned and best practices within the team or for one's future work 	4	67	0	0	2	33
19. Manage relationship with Subject Matter Experts (SMEs), customers, or stakeholders						
<ul style="list-style-type: none"> • Accommodate customer's or stakeholder's needs, schedule, style, and culture 	11	46	10	42	3	13
<ul style="list-style-type: none"> • Build and maintain effective relationship with SMEs, customers or stakeholders, including managing difficult SMEs, customers or stakeholders 	17	43	18	45	5	13
<ul style="list-style-type: none"> • Educate SMEs and customers/vendors/stakeholders 	10	63	5	31	1	6
20. Apply business acumen to build a business case for the organization's instructional programs						
<ul style="list-style-type: none"> • Understand the overall business process and objectives 	3	30	7	70	0	0
<ul style="list-style-type: none"> • Write training/business proposals 	1	50	1	50	0	0
<ul style="list-style-type: none"> • Benchmark other organizations 	2	67	1	33	0	0

**APPENDIX K-3 COMPETENCIES AND PERFORMANCE STATEMENTS BY
PROJECT TEAM SIZE**

(N=15)

Competency	Project Team Size					
	Big		Medium		Small/Solo	
	L.S.	%	L.S.	%	L.S.	%
Professional Foundations						
1. Communicate effectively, in visual, oral, and written formats						
• Write and edit text clearly, correctly and appropriately for the target audience	8	30	14	52	5	19
• Communicate clearly and effectively in a language understood by developers	4	20	13	65	3	15
• Ask the right questions to extract information from SMEs and stakeholders	4	17	11	46	9	38
• Apply message design principles for screen design	2	14	11	79	1	7
• Listen well to understand and translate information for instruction	1	20	3	60	1	20
• Negotiate with customers, vendors or stakeholders to manage expectations, goals and resources	1	14	4	57	2	29
• Present in meetings	4	57	2	29	1	14
• Sell ideas, proposals, or expertise to the management	0	0	3	75	1	25
2. Build trust with others by acting positively, respectfully, and diligently						
• Pay attention to details	1	20	4	80	0	0
• Be patient	2	67	0	0	1	33
• Respect others and treat them fair and professionally	7	33	11	52	3	14
• Be passionate and enjoy your job	3	27	4	36	4	36
• Self-motivated, committed and positive	1	20	4	80	0	0
• Adapt to criticism and changes without taking personally	0	0	4	67	2	33
• Set an example by working	0	0	1	100	0	0

hard						
3. Apply research results and instructional theories to the practice of Web-based instructional design						
<ul style="list-style-type: none"> Promote and apply instructional principles, theories, and research results to the instructional system design process 	14	33	20	47	9	21
<ul style="list-style-type: none"> Read widely on professional discussions and publications 	1	7	11	79	2	14
4. Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction						
<ul style="list-style-type: none"> Be creative and innovative 	3	14	12	57	6	29
<ul style="list-style-type: none"> Study the knowledge of the subject matter with interest and curiosity 	1	14	12	57	2	29
<ul style="list-style-type: none"> Maintain good computer skills in general 	9	45	6	30	5	25
<ul style="list-style-type: none"> Learn and try out emerging technologies and methodologies, be open minded 	11	33	11	33	11	33
<ul style="list-style-type: none"> Join professional organizations and social groups and attend the meetings and events, physically or virtually 	4	18	13	59	5	23
<ul style="list-style-type: none"> Network regularly with other professionals 	1	17	3	50	2	33
<ul style="list-style-type: none"> Get professional certification or recertification 	2	40	2	40	1	20
<ul style="list-style-type: none"> Update knowledge and skill set by going back to school for formal training 	1	100	0	0	0	0
5. Identify and comply with legal, ethical, and regulatory requirements						
<ul style="list-style-type: none"> Keep proprietary information confidential and follow the required procedures 	0	0	0	0	2	100
<ul style="list-style-type: none"> Comply with participating employee's union regulations and policies 	0	0	2	100	0	0
6. Successfully complete multiple tasks and responsibilities						

<ul style="list-style-type: none"> Work on multiple projects at a time 	3	50	3	50	0	0
<ul style="list-style-type: none"> Work with the combined roles of project manager, instructional designer, instructional developer in a given project 	4	24	3	18	10	59
Planning & Analysis						
7. Conduct a needs assessment pertinent to the goals of the Web-based instruction						
<ul style="list-style-type: none"> Analyze the given data (needs analysis, course requirements, performance analysis, existing content etc.) from customers or stakeholder 	6	33	9	50	3	17
<ul style="list-style-type: none"> Identify the needs and performance gap 	3	19	8	50	5	31
<ul style="list-style-type: none"> Align business goals to instructional objectives 	8	67	3	25	1	8
8. Analyze the characteristics of the target audience						
<ul style="list-style-type: none"> Collect, understand and analyze learner characteristics 	5	26	10	53	4	21
<ul style="list-style-type: none"> Analyze the characteristics of the learning environment 	0	0	2	67	1	33
9. Conduct task analysis and content analysis						
<ul style="list-style-type: none"> Undertake content research and analysis utilizing existing or public resources 	4	18	10	45	8	36
<ul style="list-style-type: none"> Conduct focus group to assist task analysis 	2	67	1	33	0	0
<ul style="list-style-type: none"> Chunk or sequence instructional content for a course 	5	31	7	44	4	25
<ul style="list-style-type: none"> Observe and analyze master performers to assist task analysis 	1	13	4	50	3	38
<ul style="list-style-type: none"> Organize a set of related content into a curriculum or program 	6	67	2	22	1	11
10. Analyze the characteristics of available technologies and tools for the Web-based instruction project						
<ul style="list-style-type: none"> Identify the capabilities of commonly available software and tools 	5	23	13	59	4	18

• Determine appropriate technique, technology, and media to support learning objectives and strategies	10	30	15	45	8	23
• Evaluate and determine appropriate tools for design and development	0	0	10	56	8	44
• Identify the potentials and limitations of WBI	5	63	1	13	2	25
Design & Development						
11. Determine appropriate instructional strategies and techniques						
• Create relevant learning objectives and corresponding instructional strategies	10	30	16	48	7	21
• Design and develop appropriate interactivity or instructional activities to allow learners to practice, apply, and engage	5	19	18	67	4	15
• Design visually appealing instructional materials	6	46	4	31	3	23
• Add interesting and fun elements to the learning experience	2	13	7	47	6	40
12. Design instructional materials for development						
• Develop and utilize testing and review strategies for quality control	8	26	16	52	7	23
• Create storyboards with descriptions for graphics, audio, video, interaction, and simulation, as well as audio scripts	8	30	11	41	8	30
• Write design documents	7	30	9	39	7	30
13. Develop instructional materials						
• Ensure the interface is created and compatible with other media elements	2	100	0	0	0	0
• Revise as necessary based on the feedback from customer(s) or sample audience	10	38	11	42	5	19
• Create a prototype to communicate the look and feel and/or basic functionality	2	22	6	67	1	11

• Create and edit graphics and other non-multimedia instructional materials	6	20	13	43	11	37
• Produce and edit animation, video and audio Web materials	6	21	8	29	14	50
• Do programming or coding with computer languages	3	20	3	20	9	60
• Direct, monitor or act in the audio or video recording	2	25	2	25	4	50
14. Evaluate and assess the Web-based instruction and its impact						
• Validate content or strategies by formative or summative evaluation or both with sample audience onsite or remotely	9	38	8	33	7	29
• Develop and implement level 1 and/or level 2 evaluation plans	7	28	12	48	6	24
• Develop and implement level 3 and/or level 4 evaluation plans	1	13	4	50	3	38
• Run statistic research and analysis on the collected evaluation data	1	33	2	67	0	0
• Recommend other instructional or non-instructional interventions using the evaluation data	1	33	2	67	0	0
15. Design instruction to be appropriate for global usage						
• Ensure the instructional content is appropriate in language and culture for global audience and translation	4	44	4	44	1	11
• Be sensitive to accessibility design	0	0	1	100	0	0
Implementation & Management						
16. Deliver and implement end products						
• Deliver and implement the end product (to the customer) in a format or platform appropriate for the learning and management environment	7	27	9	35	10	38
• Understand and utilize LMS or other implementation	2	13	10	63	4	25

environment for implementation, training management and possibly performance improvement recommendation						
• Set up and schedule training sessions	1	33	2	67	0	0
• Administrate registration process	0	0	3	75	1	25
• Facilitate training sessions	2	50	2	50	0	0
• Deliver instructions and training synchronously or asynchronously	0	0	3	100	0	0
17. Plan and implement assignments and resources to achieve project goals						
• Manage budget	2	18	8	73	1	9
• Lead, manage, and coordinate with team members	19	31	38	62	4	7
• Support and coordinate with the project manager/ manager	2	25	4	50	2	25
• Plan and stage a sign-off or buy-in process with the customer/stakeholders	9	33	10	37	8	30
• Select and partner with the vendor or get support from another team	3	14	13	59	6	27
• Keep track and report on project progress	7	30	14	61	2	9
• Manage time efficiently	9	29	17	55	5	16
• Organize and archive documents and other materials	2	40	2	40	1	20
• Create project plans	5	45	3	27	3	27
• Recruit and allocate human resources	2	100	0	0	0	0
18. Promote efficiency and effectiveness for internal and external collaboration						
• Educate, mentor and provide documentations to the team or other related staff about the right procedure	2	25	2	25	4	50
• Create efficient workflow and platform for internal and external collaboration	13	45	11	38	5	17
• Provide operational templates, other technical	5	26	8	42	6	32

specifications, standards, and repository to achieve efficiency and consistency within the team						
<ul style="list-style-type: none"> • Work with remote team members, SMEs and customers/vendors/stakeholders 	3	21	8	57	3	21
<ul style="list-style-type: none"> • Collect, establish and disseminate lessons learned and best practices within the team or for one's future work 	1	17	3	50	2	33
19. Manage relationship with Subject Matter Experts (SMEs), customers, or stakeholders						
<ul style="list-style-type: none"> • Accommodate customer's or stakeholder's needs, schedule, style, and culture 	6	25	12	50	6	25
<ul style="list-style-type: none"> • Build and maintain effective relationship with SMEs, customers or stakeholders, including managing difficult SMEs, customers or stakeholders 	5	13	26	65	9	23
<ul style="list-style-type: none"> • Educate SMEs and customers/vendors/stakeholders 	3	19	7	44	6	38
20. Apply business acumen to build a business case for the organization's instructional programs						
<ul style="list-style-type: none"> • Understand the overall business process and objectives 	3	30	4	40	3	30
<ul style="list-style-type: none"> • Write training/business proposals 	2	100	0	0	0	0
<ul style="list-style-type: none"> • Benchmark other organizations 	0	0	3	100	0	0

APPENDIX L PERFORMANCE STATEMENTS FOR EXPERT

INSTRUCTIONAL DESIGNERS IN WBI

1. Analyze the given data (needs analysis, course requirements, performance analysis, existing content etc.) from customers or stakeholders.
2. Create relevant learning objectives and corresponding instructional strategies.
3. Ensure the interface is created and compatible with other media elements.
4. Develop and utilize testing and review strategies for quality control.
5. Create storyboards with descriptions for graphics, audio, video, interaction, and simulation, as well as audio scripts.
6. Educate, mentor and provide documentations to the team or other related staff about the right procedure.
7. Revise as necessary based on the feedback from customer(s) or sample audience.
8. Create a prototype to communicate the look and feel and/or basic functionality.
9. Accommodate customer's or stakeholder's needs, schedule, style, and culture.
10. Undertake content research and analysis utilizing existing or public resources.
11. Build and maintain effective relationship with SMEs, customers or stakeholders, including managing difficult SMEs, customers or stakeholders.
12. Validate content or strategies by formative or summative evaluation or both with sample audience onsite or remotely.
13. Deliver and implement the end product (to the customer) in a format or platform appropriate for the learning and management environment.
14. Develop and implement level 1 and/or level 2 evaluation plans.
15. Create efficient workflow and platform for internal and external collaboration.
16. Design and develop appropriate interactivity or instructional activities to allow learners to practice, apply, and engage.
17. Design visually appealing instructional materials.
18. Add interesting and fun elements to the learning experience.
19. Manage budget.
20. Provide operational templates, other technical specifications, standards, and repository to achieve efficiency and consistency within the team.
21. Collect, understand and analyze learner characteristics.
22. Promote and apply instructional principles, theories, and research results to the instructional system design process.
23. Write and edit text clearly, correctly and appropriately for the target audience.
24. Pay attention to details.
25. Lead, manage, and coordinate with team members.
26. Communicate clearly and effectively in a language understood by developers.
27. Be creative and innovative.
28. Ask the right questions to extract information from SMEs and stakeholders.
29. Be patient.
30. Study the knowledge of the subject matter with interest and curiosity.
31. Support and coordinate with the project manager/ manager.
32. Conduct focus group to assist task analysis.

33. Chunk or sequence instructional content for a course.
34. Plan and stage a sign-off or buy-in process with the customer/stakeholders.
35. Select and partner with the vendor or get support from another team.
36. Keep track and report on project progress.
37. Identify the capabilities of commonly available software and tools.
38. Maintain good computer skills in general.
39. Respect others and treat them fair and professionally.
40. Learn and try out emerging technologies and methodologies, be open minded.
41. Understand the overall business process and objectives.
42. Educate SMEs and customers/vendors/stakeholders.
43. Join professional organizations and social groups and attend the meetings and events, physically or virtually.
44. Read widely on professional discussions and publications.
45. Network regularly with other professionals.
46. Develop and implement level 3 and/or level 4 evaluation plans.
47. Observe and analyze master performers to assist task analysis.
48. Work with remote team members, SMEs and customers/vendors/stakeholders.
49. Determine appropriate technique, technology, and media to support learning objectives and strategies.
50. Manage time efficiently.
51. Work on multiple projects at a time.
52. Organize and archive documents and other materials.
53. Ensure the instructional content is appropriate in language and culture for global audience and translation.
54. Identify the needs and performance gap.
55. Write design documents.
56. Understand and utilize LMS or other implementation environment for implementation, training management and possibly performance improvement recommendation.
57. Set up and schedule training sessions.
58. Administrate registration process.
59. Organize a set of related content into a curriculum or program.
60. Write training/business proposals.
61. Apply message design principles for screen design.
62. Create and edit graphics and other non-multimedia instructional materials.
63. Produce and edit animation, video and audio Web materials.
64. Do programming or coding with computer languages.
65. Collect, establish and disseminate lessons learned and best practices within the team or for one's future work.
66. Benchmark other organizations.
67. Evaluate and determine appropriate tools for design and development.
68. Keep proprietary information confidential and follow the required procedures.
69. Listen well to understand and translate information for instruction.
70. Be passionate and enjoy your job.
71. Work with the combined roles of project manager, instructional designer, instructional developer in a given project.

72. Create project plans.
73. Negotiate with customers, vendors or stakeholders to manage expectations, goals and resources.
74. Present in meetings.
75. Facilitate training sessions.
76. Run statistic research and analysis on the collected evaluation data.
77. Recommend other instructional or non-instructional interventions using the evaluation data.
78. Sell ideas, proposals, or expertise to the management.
79. Comply with participating employee's union regulations and policies.
80. Recruit and allocate human resources.
81. Self-motivated, committed and positive.
82. Direct, monitor or act in the audio or video recording.
83. Deliver instructions and training synchronously or asynchronously.
84. Align business goals to instructional objectives.
85. Identify the potentials and limitations of WBI.
86. Get professional certification or recertification.
87. Analyze the characteristics of the learning environment.
88. Be sensitive to accessibility design.
89. Adapt to criticism and changes without taking personally.
90. Set an example by working hard.
- 91.** Update knowledge and skills by going back to school for formal training.

APPENDIX M PERCEPTION ON FUTURE WBI

Participant Code	Perception of WBI Future
001	<p>Social media for instructions</p> <p>Caution:</p> <ul style="list-style-type: none"> - How knowledge sharing can be used for instructions? - How to use the social media to convey the information but not necessarily performance based instruction? - How to integrate the social media aspect to instruction without losing the integrity of the instruction itself?
002	<p>The move to mobile. A lot of learning delivery is going to happen more on mobile devices. May not be traditional Web-based instruction, it may be more applications, more information-based. A wider range of solutions in learning delivery. Can be very informal.</p>
003	<p>The general people are developing Web instruction materials now in HowTo, YouTube. It is driven by the novices, developed by the novices. Nobody is monitoring it, nobody is looking at whether or not it is true instruction, how and if that person is an expert.</p> <p>Caution:</p> <ul style="list-style-type: none"> - We should be slow to keep up with that trend for formal learning. Use informal learning as a support, but don't rely on that. - To design instruction to meet the learner's needs, we really need experience, and that piece is never going away. Learning is going to become more and more technical at faster pace, we are always going to need sound instruction designers, we are not going to rely on general public on everything.
004	<ul style="list-style-type: none"> o More Web-based instructional training. With the Clouds technology, we are able to launch more Clouds courses, share more real time, to have more collaboration between different learners. So learners at one location can see what's happening in other locations. Get learners collaborate and learn together. o More projects can be done over the Clouds remotely in a team with members in different physical places, with protected storage space, controlled sharing and real time reviewing.
005	<ul style="list-style-type: none"> o Things are getting leaner and meaner, the employers are looking for instructional designer to be a designer and developer and have project management skills. The hard coding Flash developer days are starting to go away. o Organizations are realizing most successful instructional designers are very self-directed and very much have to manage the tasks that they are doing. They understand that instructional design is the profession and there is art and science to it. o Won't have pure eLearning , there is always somewhat blended. People are not going to go back as much to the classroom training as it has been in the past. We should be able to work with the blended solution and to use the technology work across geographies. o Broad audience, diverse preference and learning style.
006	<ul style="list-style-type: none"> o Instructional design is becoming more technology involved, business oriented. o More just in time training, as well as the traditional training. Continue to have "books on line" interactive type eLearning, but the information will be presented in just-in-time smaller segments. o With the evolution of smart phones, mobile knowledge management databases will become more prevalent. o More virtual K-12 schools.
007	<ul style="list-style-type: none"> o More mobile devices. o Learning becomes more of where you go out and find the information that you need.
008	<ul style="list-style-type: none"> o More video. More mobile. Have more Web-based instruction pervasive and easier and accessible. So it's going to be more of a pull as a top down push. There are going to be technologies and implementation techniques that are going to be right in front of

	<p>you.</p> <ul style="list-style-type: none"> ○ More convenient and on demand. More advisory type of tools, where the system is analyzing your business and your actions and it will alert you or assist your learning. ○ The social media technologies are becoming the collaborative technologies.
009	<ul style="list-style-type: none"> ○ More hands-on simulation, like Flash or video. ○ More job related. ○ It is going to continue that we don't see training department in every company.
010	<ul style="list-style-type: none"> ○ Understand what social media is and its differences, how content exists in free flow of communication. ○ Apps driven augmented reality: <ul style="list-style-type: none"> - Classroom space got expanded. - Performance support tools & elements. - Automate help in collaborative space. - How to develop learning apps. ○ Web based training world is Oh my!
012	<ul style="list-style-type: none"> ○ Instruction means something that is designed. ○ We are seeing more experimentation with virtual settings, where content is delivered less chronologically. The learners drive the direction and the control of their own learning processes. That does not mean that there is no design, though. It just means that it is less directive and more learner controlled. ○ As the technology improves and has improved, there is more utilization of virtual classrooms. Instructors are going synchronized classes in a virtual setting where there are distributed learners across the geographic distribution, maybe globally. Very much instructional, very structured, it is scripted, interactions built in advance. ○ The cost overall is lowering. That allows the bigger companies to do more, but also smaller organizations to be able to do it at all. It is not so much just that this is where WBI is moving from now to the future, it is rather than people are getting into it in the first place who have not had the opportunity to get into it before. ○ A push towards the conversion of existing materials that are used for face-to-face instruction to the WBI. Online class is primarily put to the autonomy of the individual instructor.
013	<ul style="list-style-type: none"> ○ Instructional designers have to have an incredibly open mind because there are so many things that they need to pay attention to. Technology for example, because within two years, everybody's going to be designing things for a tablet. ○ People are expecting rich media, simulations, interactions. People are expecting very engaging experience when they take a course. They don't want to just be told something; they want to be engaged and they want to interact with that course and things like that, and have decisions. Learners will not waste time with a course. If it doesn't engage them, they're going to be out into the next thing or they'd find another way to learn it. ○ Edu-tainment.(Education + entertainment)
014	<ul style="list-style-type: none"> ○ Mobile learning. ○ People start using more social learning communities. More informal learning opportunities and more collaborative instructional design. Designing learning that uses the learner as the SME. With more bandwidth, we can do a lot more video. Get better at courses of online learning for soft skills.
015	<p>Less traditional, shorter timelines, less stable content, shorter shelf life. Produce the glossy things with very little tools. Do all these fancy high tech things like informal learning and drive that through social media.</p>
016	<ul style="list-style-type: none"> ○ The technology is allowing for more rapid design and development, rapid prototyping. ○ More virtual, more online collaboration. Distance education integrated with virtual instructors into Web based design or to supplement Web based design. Online courses are more prevalent and more accepted. More application in new frontiers, across industries and professions.

APPENDIX N ADVICES FOR PEERS AND NEW GRADUATE IN WBI

Participant Code	Advices
001	Utilize professional groups' meetings, training, and webinars, and publications, keep reading to keep with what's going on.
002	<ul style="list-style-type: none"> ○ To keep up with the new development, we have to spend at least an hour a day reading all the literature that's on the Web. It's very hard to keep up with, but we have to do it, or the world will pass us by. ○ A designer has to keep up with the latest developments in learning theories as well as technology. We should at least understand what the latest technology is and what it can do and cannot do. ○ Better to have a very supportive manager: Encourages everybody for various professional groups, their publications, blogs, and LinkedIn discussion boards, and possibly sponsor national conferences. If not, go to a lot of local meetings, such as ISPI, ASTD local chapter meetings, and the Society for Technical Communications.
003	<ul style="list-style-type: none"> ○ Definitely keep in touch with former colleagues. Do a lot of readings. Attend seminars and meetings. Do a lot research on the Web for general browsing, benchmarking of vendors to see what other companies are doing, what's the trend. ○ Do social networking with LinkedIn, Facebook. More companies are getting on the Web too, that gives us a chance to network professionally, and to join groups that are keys in our interest areas.
004	<ul style="list-style-type: none"> ○ Subscribe to online sites or magazines that are in our field to be constantly updated with what's going on ,what's coming down the pipe, what's the other people doing, what's the other companies doing. Attend conferences because that is where we get some of our better ideas. Never stop learning, get paper magazine and attend conferences, you always need to, because at least to know what is going on. ○ If you don't keep up what's going on, you are going to find yourself out of job, producing "samo, samo" instead of coming up with different ways to do things. ○ Recommendation: LinkedIn, Facebook, ASTD, ISPI, Lectora group.
005	<ul style="list-style-type: none"> ○ We should be involved in the professional organizations. Join groups at LinkedIn, professional chats, do networking to keep informed. It's important to be connected. We should weave in researches. We should be in the position to educate ourselves, it helps to be educated to be an expert. ○ For training professionals who are skilled depending on background, for people who just fall in to positions because they have been around for a couple of years, there's definitely a difference in terms of approach and success rate. ○ Be a person with credential and experience so to have a better collaboration with other experts in the field. ○ Recommendation: ASTD, ISPI, eLearning blogs.
006	<ul style="list-style-type: none"> ○ As an ISD, we are never done with learning. Don't isolate ourselves, attend professional meetings , participate in LinkedIn forums on eLearning and conferences. Keep reading to keep up with broad knowledge. ○ Teach ourselves emerging technologies. ○ Keep thinking about the proper place for social learning, such as LinkedIn, blogs, Twitter, Nings, wikis.
007	<ul style="list-style-type: none"> ○ We need to demonstrate that our skills add to the bottom line – that as a business implementing a new product to service, that its success is closely related to how well people are prepared to perform. ○ We need to demonstrate competency in the tools that are required to do the job. Having a strong foundation of learning theory is very important. ○ Have business process knowledge, like Six Sigma. Build that into academic program.
008	<ul style="list-style-type: none"> ○ Keep up with trade publications, new research, new technologies and plug into other

	<p>arenas of technology, not just your own. Join blogs or other case management portals.</p> <ul style="list-style-type: none"> ○ Designing and developing is easy, managing the project as a whole, managing, coordinating and relying on different people is difficult. Stay current with that type of skills. Have analytical skills, the design skills and communication skills, as opposed to the coding skills. ○ Play with tools. A lot of readings. ○ Recommend: ASTD, ISPI.
009	<ul style="list-style-type: none"> ○ Web development applications are changing all the time. Be familiar with Adobe Creative Suite and stay on top of it. ○ Stay involved with a professional organization. Sign up for various LinkedIn groups and take a look at the discussions. ○ Wish companies realize the importance of training and how we help not only the companies but the end users. We are part of a process that's involved in prevention. A lot of times it's more cost effective to throw money toward preventative means rather than fixing problems once they arise. Wish companies realize the importance of hiring a full time training department.
010	<ul style="list-style-type: none"> ○ The people side of learning is not going to change soon. If anything, we tend to be getting worse. The technology side of it is constantly changing. Must have a good understanding of it. What do we do with a new widget? Participate, be part of it, ask, observe with strategic point of view. Be excited, not passive, don't be techno-phobia. We are going to hurt ourselves if we refuse to learn and draw a line between designer and developer. Be a learner. Get a broad experience. ○ Have a good blend of academics and practitioner. ○ Socializing with other practitioners. Go to meetings. ○ Be aware of global population. ○ Be creative.
011	<ul style="list-style-type: none"> ○ Be self motivated to keep up with this new information. Be part of professional organization, ISPI or ASTD. Because often times they have their fingers on new technology. ○ Become certified either through ASTD or ISPI. Part of the recertification process requires ongoing education, university coursework. ○ Attend conferences. Continually get better at our job and stay abreast of the changes and where the field is going. ○ Instructional design tracks very detail-oriented people who are the ones seem to excel, because of the nature of the job. The challenge is that those are the same kind of people who are less adapt at the soft skills or focusing on the relationship side of things or being the best team players that they can be. Be able to be sensitive and aware of some of the non-technical things that can often times be just as important, if not more so.
013	<ul style="list-style-type: none"> ○ Folks that have been in the business for a period of time, get out of the comfort zone, look and see what else is out there. Browse and critic other courses. ISDs today need to really think about engaging the learner, to focus on that learner, to get this information to stick and to make them want to learn. Stay in touch with the younger audience and find out from them what kind of things would they like. ○ Learn how to design for tablets. ○ People are finding ways to get information all over the place, they're learning from YouTube. Social informal learning is absolutely where people get information. There's going to be more of an emphasis on structuring those and make sure that information is appropriate and correct. ○ Don't miss the boat, change your skills. We don't have to be an expert but at least be open to it. ○ Read often. It's very important to be part of those. Once in a while, talk the training talk with peers. ○ Go to the consortium or any of those large events, or smaller local ones.
014	<ul style="list-style-type: none"> ○ Be on online forums, such as LinkedIn group, the Articulate user community, or the Captivate communities for example, to keep up with technology in the field ○ ASTD or ISPI conferences and events, when the company pays for it.

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- 015
- Don't be the kind of instructional developers or designers who just do it, get the paycheck, and go home. Be the one with a broad skillset, who are constantly reading, blogging, going to conferences, incorporating old and new and mashing it up, and not looking at the boundaries but looking for the solutions. It's all about performance improvement. We need to be internal business consultants.
 - Create things that have impact. Guide somebody not to do that has no impact.
 - Companies should invest more in training when the economy was down.
-
- 016
- Instruction designers are trained properly in analysis, and how to correctly identify training objectives that are appropriate for Web and not appropriate for Web, and also understand the requirements, understand how to treat the content to allow the learners to be effective.
 - To keep up with new technology, designers should be trained in a spectrum of authoring tools, because how people learn remains the same, what's changing is the tools. Be able to gravitate to a new tool.
 - Educational professionals will need to equip the students to design courses with different methods of delivery and more than one tool. That is unacceptable that too many designer-developers don't know to work with video and audio files. School curriculum needs to incorporate all of those tools and software into the programs.
 - Must have a strong background in instructional design theory, learning theory. Get practical experience in internship, for example. Have a portfolio when come to the workforce.
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ABSTRACT**COMPETENCIES OF EXPERT WEB-BASED INSTRUCTION DESIGNERS**

by

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August 2012

Advisor: Dr. Ingrid Guerra-Lopez**Major:** Instructional Technology**Degree:** Doctor of Education

Web-based instruction has been increasingly accepted in education, business and industry, military and government, healthcare and other sectors as a dominant means to deliver instruction beyond time and geographical constraints. However, the overall quality of WBI courses or programs remains a concern. The reasons for the ineffectiveness can be many, of which is the lack of sufficient competencies and skills in existing professionals. This study attempts to identify the domains, competencies, performance statement for instructional designers in WBI at the expert level. IBSTPI competency model has been used as the conceptual framework, utilizing mixed methods.

As a result, 91 performance statements, 20 competencies and four domains were identified. The communication skill has been rated as the most important competency for expert instructional designers in WBI. It was revealed that professional foundation domain has the highest level of support, while the planning and analysis has the least.

The study indicates that the work environment has certain impact on the performance statements and competencies. In particular, the size of company and project team are two possible factors determining the unique presentation or absence of some

competencies and performance statements, as well as the patterns of the most demonstrated competencies and performance statements. Overall, the bigger a company or instructional project team gets, the more project management skills have been demonstrated by the WBI experts. It is increasingly demanding of WBI expert instructional designers to take many different responsibilities as the project team gets smaller.

The opinions on future direction for WBI suggest social media for instruction, mobile learning, cloud learning and collaboration, virtual or online classrooms, and more on-demand and engaging WBI, as the five prevailing trends. To prepare for the future, expert instructional designers in WBI must keep getting involved, networking professionally and be open minded for emerging tools and techniques.

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