Talent Development 11 Instructional Design

by Bob Whipple, MBA, CPTD

Section 2.2 in the CPTD Certification program for ATD is Instructional Design. The first bullet reads," Skill in selecting and aligning delivery options and media for training and/or learning events to the desired learning or behavioral outcomes."

In this article, I will describe the process I have developed that has worked well for me over the past 20 years.

Step 1 Meet with the team and the leaders

I set up a few meetings to understand what they want to accomplish by an intervention. In these meetings I am like a sponge just soaking up the various bits of input. Usually the issue of trust is one factor in why they want some training, so I often recommend a trust survey to add to the data base.

Step 2 Administer a Trust Survey

I have developed my own version, but there are also commercial trust surveys that can be employed. My version identifies the general trust level and measures it in the specific organizational layers. For example: it is common for the higher levels in an organization to believe trust is at a pretty high level. When you get to the lower levels, the data spreads out and many people feel trust is pretty low.

My survey also has about 30 areas where there could be an issue causing lower trust. For example, accountability and/or transparency often surface as an issue within an organization.

I feed back the information to the team and watch their reactions to it. It is generally a positive reaction, like I am on the right track.

Step 3 Look at extant data

The organization will likely have internals surveys for quality of work life or turnover data. They might have investigations of employee complaints. I gather all of the information they are willing to share with me.

Step 4 Identify most urgent training needs

This is done with another quick survey in which I identify over 80 different potential training topics and ask each participant to identify, for each one, what is his or her opinion of the urgency for training on the following scale:

0= no need at this time

1= routine – may be a little helpful

2= Important now – this topic would be very helpful

3= Urgent – we really need this right now

The 80 different topics cover a wide range of potential topics, such as, Communication skills, Emotional Intelligence, Understanding Body Language, Leading Successful Change Programs, Customer Service, etc.

Step 5 Winnow down the field

I now go into an analysis phase where I take all the data I have gathered (usually in just a few days) and compare it to a set of modules that I have built that cover about 100 different training topics. Based on the data, I run a “comb” through the 100 potential topic areas and out pops a subset (normally 10-20 topics). This is the core elements of a custom program for that organization.

I put the topics in a logical order, so there will be a logical flow and schedule a meeting with the leaders. This meeting is usually less than a week from the first moment I walked into the organization.

Step 6 Gain Commitment

At the meeting I summarize the data that has been collected and then show an outline of the development program that was custom designed to meet their needs. At this point, I almost always get a positive reaction to the proposal, because the data came from them. I recall one CEO looking at the proposal and writing BINGO next to the 7 action items I listed.

By this point I have not charged the client anything for my effort. I can give a pretty accurate estimate of the number of sessions that will be required and also the fee I would charge. My batting average for approvals is close to 90%.

Step 7 Customize the training for their particular industry

This is where I design the program to fit the specific company and industry. A program for a manufacturing plant will be quite different from a hospital or a financial planning office. I also customize the role-playing exercises, body sculptures, photographs on my slides to be for that specific industry. I will use the company logo and any pictures of the actual people I can get in the program.

Step 8 Spice it up

In every training event, I include several stories to illustrate my points in an entertaining way. I also use magic illusions that relate directly to the concepts I am training. The illusions keep people on their toes but also each one is related to the topic I am teaching at the moment. I have hundreds of illusions to draw from.

By breaking up the training with experiential things that involve the participants in physical activities, I can keep the groups fresh and having fun while they learn the vital skills.

I have found this eight-step process allows me to efficiently handle a variety of clients in totally different industries but remain effective with my instructional design.

Bob Whipple, MBA, CPTD, is a consultant, trainer, speaker, and author in the areas of leadership and trust. He is the author of: *The Trust Factor: Advanced Leadership for Professionals, Understanding E-Body Language: Building Trust Online, Leading with Trust is Like Sailing Downwind, and Trust in Transition: Navigating Organizational Change*. Bob has many years as a senior executive with a Fortune 500 Company and with non-profit organizations.

The TRUST Ambassador