

# 1

## The Training Plan



### Check What You Know

The CEO of Account Services, which provides payroll, bookkeeping, and accounting services to small and medium-sized businesses in several states, is unhappy with the employees' use of e-mail. "They don't know how to write," she told the human resources manager. "Some of the stuff they're sending out is embarrassing. And look at this. One of our best clients got this e-mail from someone in billing last week."

The HR manager read the e-mail that the CEO handed him, shocked to find a very offensive remark in the second line. "That kind of thing could land us in court," he said.

The CEO agreed. "That's one of my concerns," she said. "But I'm also worried about our relationships with our clients. Positive relationships are crucial to our business, and so many of them know us only through e-mail exchanges. And it's not only clients. Some of the internal e-mail I've seen is a mess—I've been copied on messages that made no sense at all. We can't afford having people waste time reading and writing useless messages."

"What would you like me to do?" the HR manager asked.

"I know you and your staff are busy with the new hire program. But I see fixing this problem as a top priority. Could you carve out some time to put

*(Continued)*

together some training? A workshop, or something, to make sure that people are using e-mail to get our business done, not to send out messages like this one.”

That afternoon, the human resources manager looked through some of the e-mail messages that employees in various parts of the company had written and talked with a few managers about their employees’ use of e-mail. The next morning, he called two new associates, Boris and Marietta, into his office and explained the situation.

“The CEO isn’t happy with the way people are using e-mail, and she wants us to put together a workshop. All the other associates are swamped with the new hire program. Is this something you two would like to take on?”

Boris and Marietta looked at each other. “Sure,” they said, almost in unison.

“Good.” The HR manager handed them the samples he’d printed out the day before, along with the notes from his conversations with the managers. “These will help you get started.” He opened his calendar. “Do you think you can get me some ideas within three weeks?”

As they walked down the hall toward their cubicles, Boris said, “Have you ever put together a training program before?”

“Nope,” Marietta replied. “But I took lots of workshops at my last job. And I taught high school algebra for a year, with the Teach For America program. How hard could it be?”

How hard, indeed? Boris and Marietta are about to find out.

What if you were advising Boris and Marietta? What do you think their first step needs to be?

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Many of the things we do in life begin with an idea: Let's go to Hawaii. Let's open a business. Let's add a room to our house. In the scenario that began this chapter, the Account Services CEO had an idea—let's have some e-mail training.

Implicit in the idea is that something needs to change or be improved, along with a typically vague understanding of the desired outcome. Let's go to Hawaii because we've been working too hard and a vacation on the beach will help us relax. Let's open a business because we need some extra income. Let's add a room to our house because our children need rooms of their own. Let's have an e-mail workshop because people are wasting time and sending e-mail that embarrasses the company.

But having an idea is one thing—turning it into reality is another. The path to the destination can be filled with obstacles and surprises. To get there without wasting valuable time and other resources, you need a plan.

Here's what's in this chapter:

- Why you need a plan
- ADDIE—a model for planning instructional programs
- What to consider when using the ADDIE process

*Instruction is only one of several possible solutions to problems of human performance, and not even the one most often called for. . . . It is possible to construct a course that nobody needs, either because instruction is unrelated to solving the problem that gave rise to it, or because it "teaches" things the students already know.*

Robert F. Mager,  
*Preparing Instructional Objectives*

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## 1. Why You Need a Plan



### Check What You Know

The HR manager asked Boris and Marietta to put together a plan to meet the CEO's request for an e-mail workshop. Why do they need a plan? What will a plan help them do?

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I've known a number of people who have started successful businesses. One friend opened a children's clothing store. Another realized a life-long dream when she started a small restaurant. Others have started gardening businesses, web-design and publishing companies, bookkeeping firms, and day care programs. Those entrepreneurs didn't just leap from idea to success—they knew that a successful business doesn't just happen. Instead, they began with a plan that described their goals in detail and laid out specific steps for achieving them. They evaluated the feasibility of their ideas in the marketplace; figured out what money, time, expertise, and other resources they would need, how to obtain them, and how to make the best use of them; calculated the potential return on their investment; identified possible obstacles; and made action plans and checklists for all the tasks that needed to be done. Along the way, they made significant changes to their original ideas as they discovered better ways to accomplish their goals.

To succeed in today's highly competitive, rapidly changing environment, organizations have an increasing need for training that helps their employees work more productively and increases their ability to retain top performers. But they can't afford to waste scarce resources on training that is thrown together on a whim or costly programs that fail to accomplish meaningful goals. Instructional designers who neglect the planning process risk embarking

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on a project that wastes valuable resources without achieving a worthwhile outcome, disappointing and frustrating everyone involved, and leaving the organization worse off than it was before.

As Rosemary Caffarella says in her book, *Planning Programs for Adult Learners*, the assumption underlying education and training programs is that something needs to change. Careful planning is the way that instructional designers identify what change is needed (and whether it is needed), what the outcome of change will be, how important it is to achieve that outcome, whether training is the best way to achieve it, and what exactly needs to be done to move from idea to reality. Without planning, a training project can be like climbing aboard an engine that has no shutoff switch but is going nowhere. The only way to get off is to jump.

## 2. Planning Instructional Programs

*The instructional systems design (ISD) process and training are means, not ends. Focusing on results, rather than focusing on providing training, causes decisions to be made in very different ways. The training development organization needs to be project-driven vs. being process- and control-driven.*

Darryl L. Sink, "ISD—Faster/Better/Easier," in T.L. Gargiulo, A.M. Pangarkar, and T. Kirkwood (Eds.), *The Trainer's Portable Mentor*

### Check What You Know

Which of the following are characteristics of the instructional design process known as ADDIE?

1. \_\_\_ ADDIE is a linear process in which you move step-by-step through the various stages.
2. \_\_\_ One primary purpose of the ADDIE process is to make sure that training is the best way to achieve a desired outcome.

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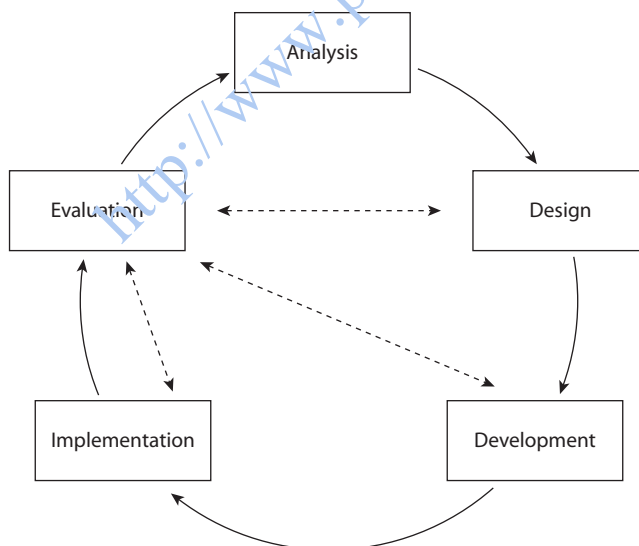
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3. \_\_\_ An important reason for using ADDIE is that it has both structure and flexibility.
4. \_\_\_ The most time-consuming part of the ADDIE instructional design process is determining the best way to deliver training.
5. \_\_\_ The ADDIE process can be used to guide an organization's entire training effort or to plan training to meet a specific need.

Although there are different ways in which to approach the instructional design process, most instructional designers use some form of the model commonly known as ADDIE. Like so many others in the training field, I've found that ADDIE—which stands for Analysis, Design, Development, Implementation, and Evaluation—has both the structure and the flexibility to keep me on the right track and make sure that my training projects achieve my clients' goals. The model is shown below.



### The ADDIE Model

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ADDIE, which is sometimes referred to as “ISD,” for “Instructional Systems Design,” is based on an instructional systems approach to solving training problems that was established by the U.S. Department of Defense, which has a significant and ongoing need to train large numbers of people—and train them well. Because the letters of the acronym appear in order, it’s easy to think that ADDIE is a rigid, linear process. Far from it: the process is designed to be dynamic and interactive, with evaluation and feedback at every step of the way. Depending on the situation, you might skip steps, do steps in a different order, and return to earlier steps in light of new information. As you use this planning process in different kinds of situations, you’ll find that it is an extremely flexible method for approaching the essential tasks and decisions in the instructional design process.

ADDIE can be used to guide an organization’s entire training effort, provide training for a team, or plan a training program to meet one specific need. In this book, you will learn the basics of the process by studying how it is used to design and develop a program to meet one training need.

Below is a brief description of each of the ADDIE stages. In the following chapters, you will learn about each stage in detail. (If you have read the first book in this series, *Training Fundamentals*, or are otherwise familiar with this process, you can read the following as a refresher or skip ahead to Chapter 2.)

## Analysis

People who start their own businesses, like the friends I described earlier, begin the planning process by asking questions, such as:

- Why am I undertaking this project?
- What’s the chance of succeeding?
- What does success look like?
- What do I need to do to achieve my goals?

The answers to those questions help them decide whether—and how—to move forward with their idea.

For a training program, one of the most important reasons for the analysis stage is to determine what change is needed, how important it is, and whether

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there is an easier, less costly way than training to achieve it. The instructional designer's key questions might include:

- What's the current situation? What is the desired outcome?
- What would happen if nothing were done?
- What's the best way of closing the gap between the current situation and the desired outcome?
- What are the needs, characteristics, and preferences of the people who are to be trained?
- Who has a stake in this training?
- What resources are available? What constraints must be considered?
- Who needs to be involved in the process of designing the program?

I mentioned earlier that you could skip steps in ADDIE. Let me revise that statement: You can't skip the analysis stage. In many cases, it doesn't have to take long or be very complicated—a few questions can provide enough information to decide whether and how to move forward. But even when the analysis stage requires a lot of time, it's worth it, because the information gathered in this stage provides a solid foundation for the entire project, shaping its scope and direction.

## *Design*

Builders do not start constructing a house by picking up boards from a pile of lumber and hammering them together. They need detailed plans—blueprints and specifications—to guide them through the construction process so that the resulting structure meets all the design and structural requirements. For a training project, you will use the design document or outline that emerges from this stage of the ADDIE process as a guide for developing a program that achieves the intended outcomes and is instructionally sound. The “blueprint” for a training program describes what people will be able to do when training is completed; the training methodology; the content the program will cover; the activities that will be used to help people learn; and the ways in which the program will be evaluated.

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## *Development*

In this stage, you will develop, manage the development of, and/or purchase everything needed to run the training program—trainer materials, participant materials, software, videos, assessments, props—whatever the program requires. This is nearly always the most time-consuming part of the process. It can take hours or even days of work to develop a one-day workshop, and weeks or months to develop e-learning modules. To use time, money, expertise, and other resources as efficiently as possible, it's very important not to begin development without a detailed, well-thought-out program design.

The last part of this stage is testing, or validating, the program to make sure that everything works as planned and to identify changes that need to be made before the program is “rolled out.” Whether to test the program informally or hold a formal pilot depends on its size, scope, and importance, as well as on the time and budget you have available.

## *Implementation*

All the hard work done to design and develop the training program pays off when it's rolled out to the learners. There are lots of tasks in this stage—everything from scheduling training and arranging for equipment and facilities to notifying participants and preparing for training, not to mention delivering the program. Depending on your specific responsibilities, you might or might not have an active role to play in this stage.

## *Evaluation*

Training isn't over when participants complete the program, and evaluation isn't a one-shot deal. Like analysis, this stage of ADDIE is the one that instructional designers most often skip, or do in a perfunctory way, yet it is one of the most important. Ongoing assessment and evaluation are crucial to making sure that training is relevant, effective, and provides a good return on investment. The information gathered during this stage helps organizations improve existing training programs and develop more effective training in the future.

### **3. What to Consider When Using ADDIE**

ADDIE is a tool, not a procedure. It's a means to an end—the idea is not to follow the process “correctly,” but to use it to achieve a specific outcome. As mentioned earlier, you won't necessarily do the steps in order, and in some

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situations you won't need to do all of them. You will often go back to earlier steps in light of new information—in fact, what you learn during the design or development stage might completely change your perception of the need and how to meet it. The process works best when you keep an open mind and remain willing to rethink your original ideas.

To make the best use of the ADDIE process, keep these suggestions in mind:

- *Pay enough attention to analysis.* As mentioned earlier, instructional designers tend to skip this stage, or not to complete it fully, especially when there are limited resources and a sense of urgency. They assume that because someone has asked for training, training is really needed. They act on information they are given without checking to make sure that it is accurate and complete. Yet when a training program fails to achieve the desired outcome or to prove worth the investment of time and resources, it's nearly always because no one bothered to do an analysis or because the analysis was incomplete.
- *Collect the right information.* You are probably familiar with the acronym "GIGO"—"garbage in, garbage out," referring to the fact that if you put a lot of nonsensical information into a computer, you're likely to get a lot of nonsensical information back. The process of designing and developing a successful training program requires gathering lots of information. But just doing a lot of research doesn't guarantee success. If the information on which you base the program design is inaccurate, incomplete, or outdated, the program is unlikely to achieve its goals. Gathering the right information means talking to the right people; asking the right questions; reading the right documents; observing people who are doing the job the right way, not the way they think it is supposed to be done; clarifying to make sure that you've understood what you are seeing, hearing, and reading; and discriminating between facts and assumptions, objective information and opinions.

## THINK ABOUT IT



Have you ever put a lot of work into a project only to have a decision-maker tell you that it wasn't what he or she had in mind and ask you to make substantial changes? Why do you think that happened? What could you have done to reduce the chances that you would have to go back to the drawing board after you'd already done so much work?

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- *Involve everyone who needs to be involved.* It's surprising how much work sometimes goes into the process of designing and developing a training program before the instructional designers have even bothered to discuss it with key stakeholders, especially those whose approval is needed before the program is rolled out. There are always lots of reasons for not bringing stakeholders into the process at an early stage: "They're too busy"; "There's nothing to show them yet"; "They don't want to see anything until it's all ready to go." But not involving key stakeholders early means that you can waste a lot of time going in the wrong direction and end up not meeting expectations.
- *As soon as you begin a training project, identify the key stakeholders whose assistance, support, and approval you will need for the project to succeed.* Those people always include anyone who has decision-making authority over

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## To Consider When Using ADDIE

- Pay enough attention to analysis, even if resources are limited and there is a sense of urgency.
- Get the right information—accurate, complete, and up-to-date.
- Involve everyone who needs to be involved—bring key stakeholders in early and keep them informed.
- If you come into a project that’s already underway, confirm what’s already been done—make sure the program design is sound.
- Keep an open mind and be willing to change direction when things change or you uncover new information.
- Be realistic—consider real-world issues and constraints.

## Boris and Marietta’s Progress

Boris and Marietta have been on a steep learning curve. They’ve talked with some experienced training professionals and read up on the instructional design process. Now they’re ready to start on a plan to take to the HR manager. They meet over lunch in the company cafeteria to discuss what they need to do.

“It’s clear to me where we have to begin,” Marietta says. “We don’t know enough about the situation. All we have is the CEO’s request for a workshop, a stack of e-mail messages, and the HR director’s notes.”

“Right,” Boris says. “We can’t do anything until we have more information. So our first task is to find out how extensive this need is and whether a workshop is really the way to tackle it.”

the program. They might also include the individual or the team who requested the training, your manager, the human resources or learning and development manager, important customers, and others. Make sure the stakeholders know that you will expect their review at important checkpoints during the process, and that you will move forward only after you have their approval.

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- *If you come into a project that's already underway, review what's already been done.* In many cases, you will join a project after a certain amount of work has already been done. For example, the need might already have been analyzed and the program designed by the time you arrive on the scene. Your role might only be to develop the program. Before starting the tasks that fall into your area of responsibility, review what was done in earlier stages, such as the results of the analysis and the learning objectives. Make sure that the training need and desired outcome were clearly identified and the program design is sound before you begin work.
- *Keep an open mind and be willing to change direction.* When you design and develop a training program, you are continually collecting information, analyzing it, and comparing it to the information you already have. At any stage of the process, new information about the situation, the learners, or the topic can stop you in your tracks, forcing you to rethink your original perceptions and ideas. In fact, one of the advantages of the ADDIE process is that ongoing assessment and evaluation are built in at every step of the way. But it's essential to remain flexible, willing to jettison unworkable ideas no matter how much you might like them or how hard you've worked to come up with them, willing even to go back to the very beginning and start the process again.
- *Be realistic.* It's great to imagine wildly and think in terms of ideals. But in the real world, there are real issues and real constraints to consider when you are planning a training program. An e-learning program might be the best way to meet the need, but if there isn't enough time or money to develop one, you'll have to find another way. The desired outcome could be achieved most efficiently with a self-study workbook, but the manager who controls the budget insists that his team needs a workshop. The organization has a perfectly usable training program that could be adapted for the current need, but a key decision-maker wants a new one developed from scratch. As a training professional, you need to work with the situation that you have, not the one you want.



## Quick Quiz

List the three to five key learning points from this chapter that will be most helpful to you.

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## What's Next?

It's during the analysis stage of ADDIE that you make sure that training is really needed and build a firm foundation for a training program. That's what you'll learn to do in the next chapter.



## Apply What You Learn

How much do you already know about the training project you selected to work on while reading this book? See how many of these questions you can answer.

1. What's the topic of this training project?

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2. Who are the learners?

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3. What's the desired outcome?

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4. Has the delivery method been selected? If so, what is it?

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5. Who are the stakeholders?

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6. What's the budget?

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7. When does this program need to be ready?

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8. What issues and constraints do you need to keep in mind?

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9. What other factors might influence or affect this program?

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## Answers to Exercise



### Check What You Know

Which of the following are characteristics of the instructional design process known as ADDIE?

1. \_\_\_ ADDIE is a linear process in which you move step-by-step through the various stages.
2. X One primary purpose of the ADDIE process is to make sure that training is the best way to achieve a desired outcome.
3. X An important reason for using ADDIE is that it has both structure and flexibility.
4. \_\_\_ The most time-consuming part of the ADDIE instructional design process is determining the best way to deliver training.
5. X The ADDIE process can be used to guide an organization's entire training effort or to plan training to meet a specific need.

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