Instructional Designer Interview

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The field of instructional design (ID) is integrated into a variety of industries. Banking, financial planning and healthcare are just a few of the industries that employ the skills of instructional designers. Formally trained instructional designers are taught a variety of models to assist in the process of developing training and education. Are these models put into practice in the 'real world'? ID students are also taught that design is usually a team process, where every person has a role to fill. Is this ideal carried into the practice of ID?

According to Clark and Mayer (2008), the use of technology in education and training has raised dramatically, especially the use of e-learning and computer based training. What criteria are used to determine if it is a valid method? Practicing instructional designers encounter challenges in their careers. What are some of the most common trends? Through an interview with a practicing instructional designer, these questions are addressed in order to better understand the contrasts between theory and practice.

Background: Jon Henry Interview

An interview was conducted with Jon Henry, Senior Instructional Designer at Fidelity Investments. The interview was conducted via email and a one on one session. The one on one session took place in the Starbucks at the Raleigh-Durham International Airport; Raleigh, North Carolina. Questions were crafted to ascertain if the ID models and theory studied in graduate level classes are put into practice. Another goal was to better understand the use of technology and the everyday challenges to instructional design.

Jon dropped out of his undergraduate program to join the Navy. While in the Navy, he finished his undergraduate degree. He was put to use as a facilitator for technology training during his last few years of naval service. He retired from the Navy at age 40, being young and needing a second career, he returned to school. Jon had enjoyed the training position and wanted

to stay close to the technology field. He went on to pursue a Masters degree in instructional technology at San Diego State University (SDSU). One of his final classes at SDSU was in web-based instructional design. It was the first one of its type to be offered at SDSU.

Upon graduation, Jon was employed as a training specialist with Electronic Data Systems (EDS) working for Blue Shield of California. At EDS, there were two popular avenues into the ID department. One, graduate from an ID program or two, work your way up from the call center. Regardless of how one was hired into the department, EDS sent all new ID department employees through their ID training program. The ID process was well developed and robust at EDS. A detailed design document was crafted for each project. The document guided the process from the initial analysis to the final evaluation of the project. While at EDS, Jon was on the team that put together the first online training program they had.

Jon moved on to be an instructional designer with Plan Soft, a web start-up company specializing in meeting planning. His role there was to train employees and clients how to use the computer based applications of the company. He developed online training and classroom training. He also spearheaded the company's initial use of synchronous training through WebEx, a web based tool for instruction and meetings. He also created product demos, online help systems and product documentation. The design process and team was much less formalized in this position. The company was small, he was the 72nd employee.

Jon is now employed with Fidelity Investments. For the past 6 years, his title was senior instructional designer. Last year, he transferred into the writing department as a technical writer. This interview will focus on his instructional design work. Jon always had an interest in personal investing and knew Fidelity to be a strong company. It was a goal of his to become employed there. Much like his position at EDS, the path to the Fidelity team was twofold. One

could be an instructional designer by trade or be moved up through the ranks of the Fidelity family. For example, a call center representative would become a facilitator of training. If they wanted to join the training team, they would be sent to a three day workshop to give them the basics in ID.

Instructional Design Model: Theory and Practice

The goal of instructional design (ID) is to make learning more efficient and effective and less difficult. (Kemp, Ross, Kalman & Kemp, 2011) ID Models have been developed to assist in the practice of designing instruction. The first appearances of ID models are in the armed forces. Gagne and others worked with the department of defense to train large numbers of soldiers with repeatable results. (Reiser, 2001). Jon began his education with these original models while in the Navy. Through his career, all of his jobs have incorporated some form of the ADDIE model. Allen (2006) asserts there are over 100 different variations of the instructional design model. Almost all of them replicate steps from the popular 'ADDIE' process—analyze, design, develop, implement and evaluate. My interviewee agreed wholeheartedly with this. Jon believes all the models proposed are just variations of the original ADDIE model.

One of the goals of this interview was to investigate how these models were used in the real world and if they were followed as loose guidelines or strict rules in the instructional design process. In Jon's career, the ADDIE model or some form of it has been a constant guide. It was followed strictly by EDS, resulting in a formal design document. It was followed more loosely by Plan Soft, using ID models as a guiding principle. Fidelity has a design document providing the scope of ID projects, but the model was incorporated into the business processes. A robust training department allows for a full team to work on a project. The steps of the ID model are fulfilled by different team members with clearly defined job duties. Analyzing is done by a

Project Manager. Design is done by Instructional Designers with input from Subject Matter Experts. Development is done by the writing staff or the e-learning department. Implementation is done according to the method of instruction by facilitators or via the computer. Evaluation comes full circle, by combining the input from the learners and the entire design team.

Jon relayed that they do use a design document at Fidelity. He would prefer the document be fleshed out more and include more detail. In reality the design document at Fidelity is more of a scope statement rather than a detailed plan. They do use an ID model; they call it FADDIEWU, which stands for feasibility-analyze-develop-design-implement-evaluate-wrap up. The wrap up is compared with Kirkpatrick's (2006) four levels of evaluation. Level one is basic satisfaction with a course. Level two is increased learning or understanding. Level three is transfer of knowledge from the course to the job. Level four is gaining results on the job because of the course. There is a proposed fifth level, return on investment (ROI). It evaluates whether the course was effective enough to justify the money spent. (Phillips, 1996) Jon relayed that they usually never make it past a level three. He emphasized that calculating ROI is a very difficult thing to do.

Design Teams

Kemp et al. (2011) outline specific roles in the instructional design process. Two important roles are Instructional Designer and Subject Matter Expert (SME). Ideally these roles would be filled by separate people with the appropriate skills. Is this the ideal repeated in practice? Or is the process more one sided? Through the interview, it was clear that Jon had dealt with SME's in each position he held. His knowledge of each field he worked in was obviously expanded after a period of employment, but the SME was always the primary source of content. Using

design models like the ADDIE and work processes, projects were kept on track with everyone's roles clarified.

In his career experience, subject matter experts (SME) have traditionally stuck to their role. The design document used at EDS and the one in use at Fidelity, keep the design roles clarified. Fidelity has business processes set up to define the scope of each person's role. They have a large design team working on various projects. The team consists of a performance consultant, a writer, an instructional designer, a subject matter expert, a project manager and the e-learning team. These positions are held by different employees with specific scopes of their job duties.

Eckel (2010) describes today's relationship between the instructional designer and the SME as one of frustration. It stems from basic misunderstandings of design and the process of design. In practice what does this relationship actually resemble? Does the relationship resemble a client/vendor or collaboration? Jon described a few different interactions with SMEs. He does notice that there is a large variation in how the SME's see the ID process and the designer. Some SME's have clear ideas how they see their content presented, sequenced and evaluated. Through conversation and work product, Jon is usually able to drive the design process even when the SME has strong opinions. There are many repeat SME's in his role, as all the work he does is for the same division of the company. They eventually learn to trust the process and the designer in his experience.

Computer based Learning and Technology

When Jon attended graduate school at SDSU, one of his final classes was in web-based instructional design. It was the first class of its type to be offered there. That was only twenty years ago, there has been an explosion of web based content since. From 2001-2006 computer

based training (CBT) represented 11% of all training, just five years later in 2006 it was at 29% (Clark & Mayer, 2008). From that dramatic increase, it appears that CBT is constant and growing in workforce training.

Fidelity has an entire department focused on e-learning. The e-learning department consists of graphic designers and technology specialists rather than designers. The e-learning department is not part of the design process of instruction. Rather, they develop modules based on the content, sequence, story boards, etc. provided to them by the instructional designers. Not every project culminates with e-learning. Many projects are delivered via the classroom setting.

There are many software applications on the market today and they can be very useful tools. They have changed the landscape of traditional instructional design from paper based instructor led to technology based instruction (Levin, 1999). Do these programs help, hinder or confuse the instructional design process? It seems that many products on the market are intended for subject matter experts fulfilling the duties of instructional designer. This is evidenced by online forums and blogs to assist in instructional design, like the articulate.com "rapid e-learning blog" (Kuhlmann 2008). Can these programs be leveraged to affect great training and to reach populations that have previously been underserved? Or has training development become so easy and inexpensive that good training is not going on anymore. The tenets of good instructional design still need to be followed

Jon has not experienced SME's functioning as e-learning designers. His employers have always had robust training departments. His assumption is that this phenomenon occurs because budgets are small or management has not experienced the benefit of a well organized training team. In Jon's experience all CBT is lead by instructional designers with the support of other team members and a design document. At Fidelity, once a training need has been determined, an

e-learning consultant is called into the design team. They are present to help decide if CBT is the optimal route for training delivery. They weigh criteria like the anticipated audience, shelf life of training, and cost for development versus other methods. For Jon, good design occurs because a model or process is followed. His thought is that poor e-learning is a result of untrained or inexperienced educators not rapid learning software.

Project Management and Learner overload

Jon discussed some of the overarching challenges and concerns in his ID career. Juggling multiple projects is an issue that will not be solved. There are always a variety of projects going at one time and they are all in a different stage of completion. Keeping the projects straight and managing them is a constant challenge. A related challenge is the workload amount. Budgets for training initiatives or departments fluctuate from year to year ("Training industry report", 2011). These budget leanings cause workload to increase or decrease. Inevitably there are shortcuts and exceptions that must be taken to accommodate an increased workload. Lastly there is the challenge of 'speed to market'. Projects have a completion or market date that is sometimes rushed at best. The finished training project is needed before adequate ID can be implemented. Again this leads to shortcuts and exceptions being made in the design process. The increased workload, unrealistic job expectations and long hours leads to increased stress and job dissatisfaction (Rich, 2011).

Conclusions and Reflection

Based on Jon's experience, ID models are used in practice. The degree in which they are used fluctuates from loose guidelines to strict processes. The design teams can consist of a designer and a SME or may be more robust departments with many people filling different roles. Instructional designers are not always formally trained in ID but all the companies Jon has

worked for provide some sort of training on ID. Through his career technology use has increased and enriched the training delivered. Issues like work overload, stress and fluctuating budgets will continue to ebb and flow. In conclusion, the ID models and techniques we study in theory are carried forward into the workplace and applied in a variety of degrees.

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