



WHAT IS INSTRUCTIONAL DESIGN (ID)?

MOVING FROM TECH WRITER TO INSTRUCTIONAL DESIGNER

INSTRUCTIONAL DESIGN & LEARNING SIG
SOCIETY FOR TECHNICAL COMMUNICATION

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A WARM WELCOME

Today's agenda:

- Introduce instructional design (ID)
- Introduce the key processes, tools, and products of ID work
- Provide a pathway for technical writers to transition into ID work
- Create a learner persona

ABOUT ME

20+ years in L&D

- Instructional design
- Technical writing
- Needs assessment
- Learning measurement
- Training

Industries

- Government/military
- IT
- Tech
- Higher Ed

I LOVE LEARNING!



WHY I LOVE LEARNING

Internally:

- Personal growth
- Challenge
- Greater understanding of the world around me
- Awareness of systems
- Empathy for others
- Better at problem solving


Externally:

- Professional development
- Helping others
- Solving problems
- Bringing people together
- Enabling growth, empowerment



WHAT IS INSTRUCTIONAL DESIGN?

THE CREATION OF A TARGETED LEARNING EXPERIENCE
TO HELP SOMEONE PERFORM BETTER ON THE JOB,
SOLVE A PROBLEM, OR USE A PRODUCT.



WHY INSTRUCTIONAL DESIGN?

Instructional

- Focused on learning
- Focused on the learner
- Focused on applying new knowledge immediately

It's instructional because it involves learning—whereby someone is receiving new information, processing it internally, and then applying it in a new set of circumstances.

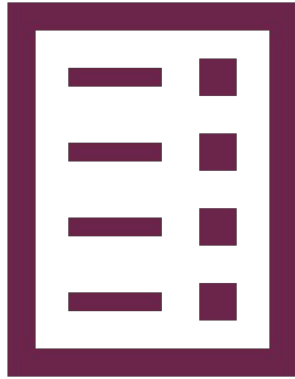
We call it instructional because it relates to training, or targeted learning, for a specific purpose (usually on the job or with a commercial product).

Design

- Strong, clear writing
- Excellent visual components
- Enhancing the learning experience

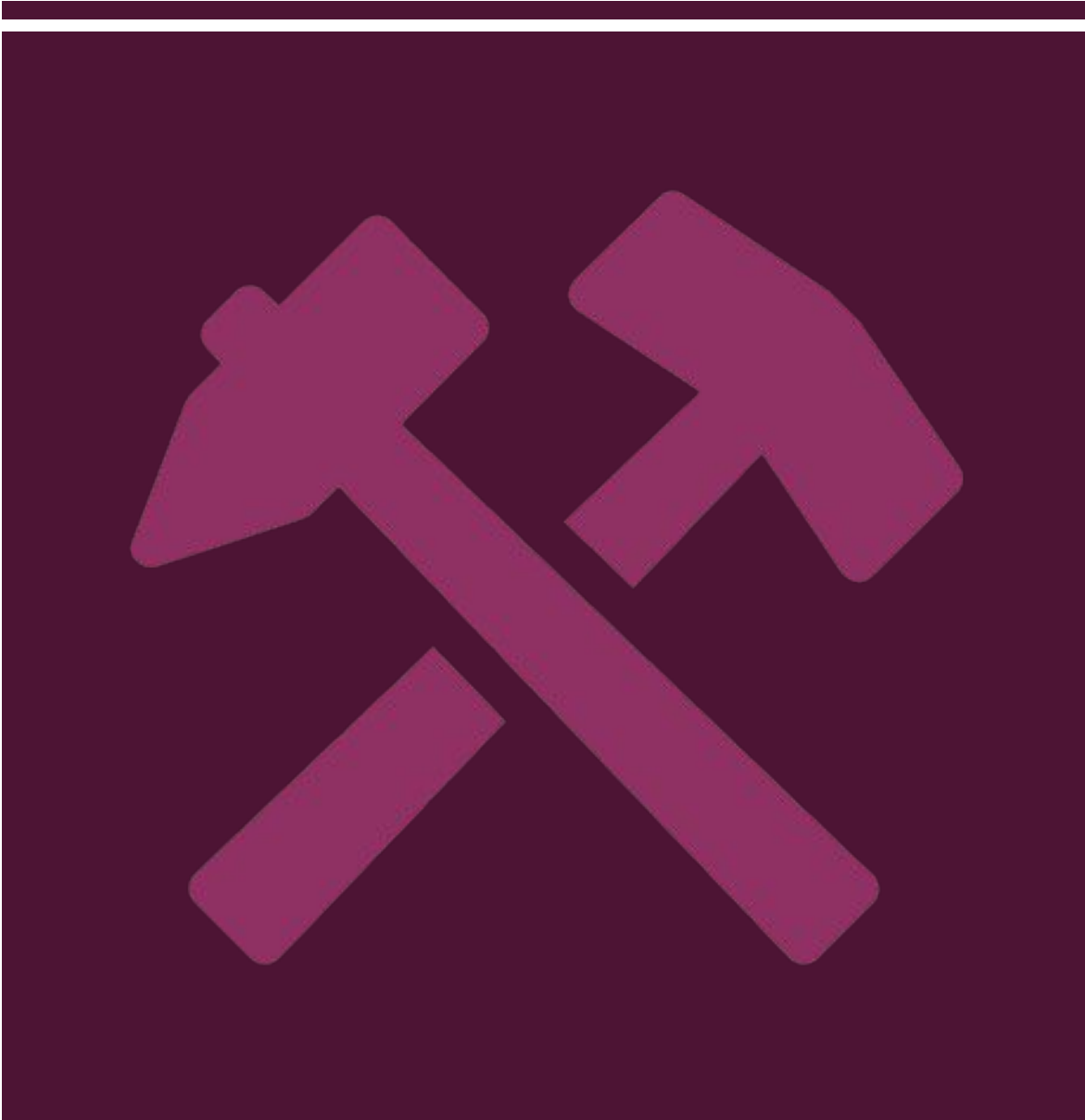
There are good ways to present information, but there are also better ways that include design strategies that increase understanding, retention, and eventual application.

Just like you probably use design as a technical writer to make your documents and content more easily understood, instructional designers use design to ensure their training content is clear, understandable, and easy to apply.



WHAT DOES ID PRODUCE?

- Instructional manuals
- User guides
- Checklists
- Procedures
- Guidelines
- Policy documents
- Training
- eLearns
- Animations
- Infographics
- Communications

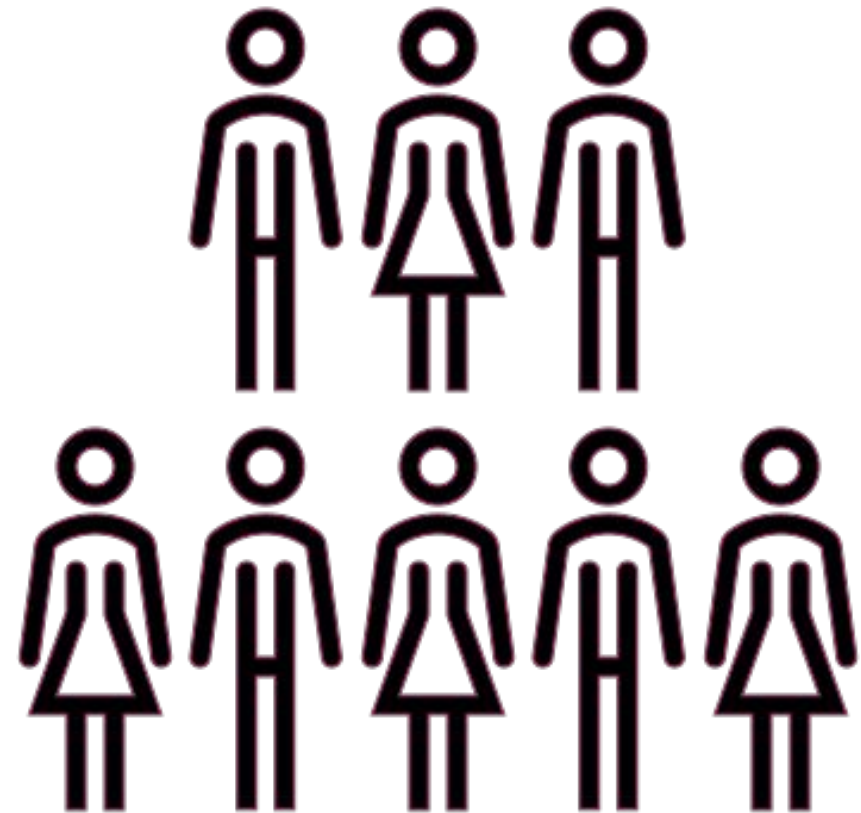


WHAT TOOLS ARE INVOLVED?

- Word processing (G-Suite, MS Office, etc.)
 - Visual design (Adobe CC, Canva, Figma, etc.)
 - Interactive design (Articulate 360, Camtasia, etc.)
 - Media production (Adobe Audition, Adobe PremierePro, etc.)
 - Measurement and analysis (MS Excel, coding, etc.)
 - Planning (MS Project, Asana, etc.)
- Plus, so much more!

WHAT ROLES ARE AVAILABLE?

| | | |
|--------------------------|---|----------------------------|
| Instructional designer | Learning architect | Learning designer |
| Learning program manager | Learning experience designer | Learning content developer |
| Animation designer | Graphic designer | Writer/editor |
| Project manager | Voiceover artist | Digital editor |
| | Diversity, equity, and inclusion educator | |



WHAT IS THE CAREER OUTLOOK FOR IDS?

- Present in nearly every industry and sector
- Continued job growth
- Multiple career opportunities due to diversified field
- Potential for career, income growth over time
- Highly suitable for independent contracting and remote work



BIG PICTURE: INTRODUCING ADDIE

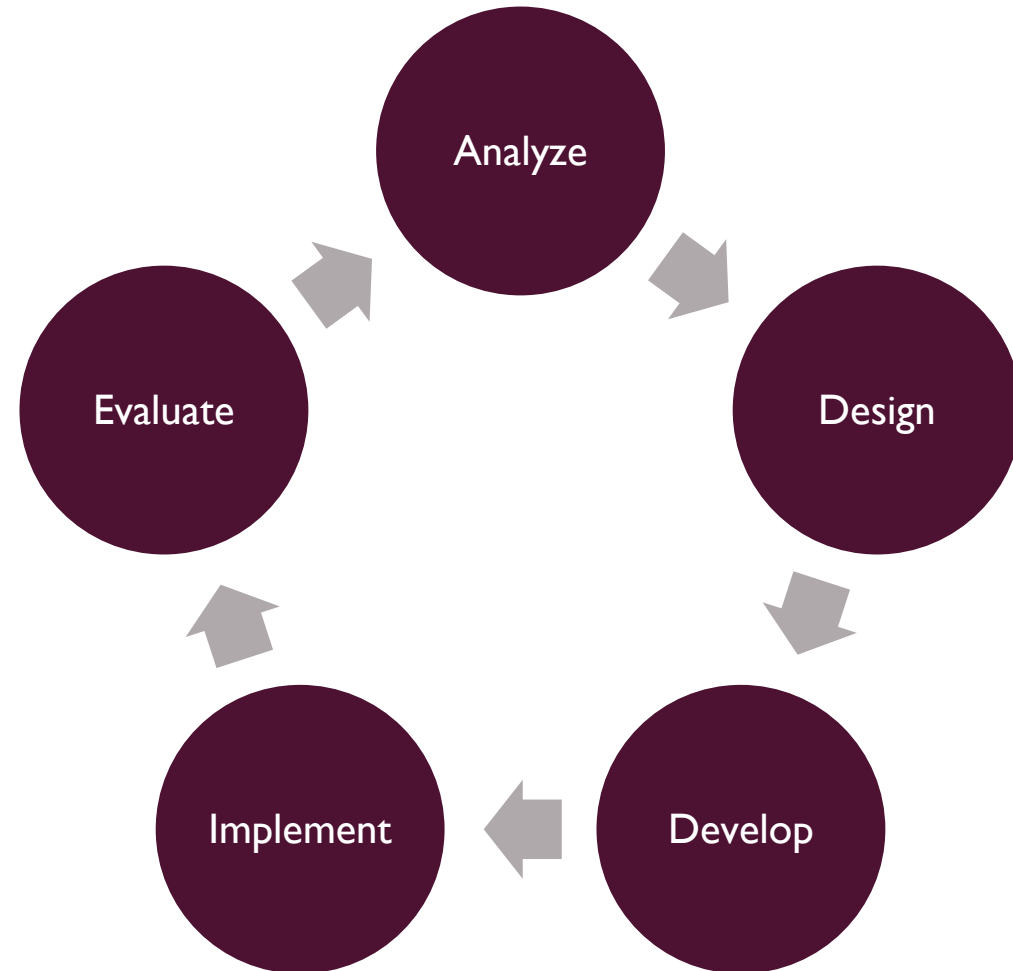
Analyze

Design

Develop

Implement

Evaluate



ANALYZE

Study and understand:

- The need or problem
- The outcomes or change desired
- The audience
- The context

Produce: Project plan, project concept document, audience/learner personas, baseline metrics, etc.









DESIGN

Plan for

- Delivery strategies
- Format
- Content
- Structure
- Interactions
- Script
- Graphics
- Layout

Produce: Storyboard, script, layout, interaction logic, flow chart





DEVELOP

Create and build:

- Audio
- Graphics
- eLearn
- Slide decks
- Handouts
- Infographics
- Learning activities

Produce: audio files, graphics, interactive scenarios, eLearns, slide decks, activities, handouts



IMPLEMENT

Perform

- User testing
- DEI/accessibility review
- Pilot testing
- Measurement initiation
- Comms launch
- Program launch
- Governance planning

Produce: Test reports, monitoring dashboard, launch plan, comms plan



EVALUATE

Track:

- Completion rate
- Testing results
- Performance outcomes
- Badging status
- Future improvement data

Produce: Professional development plan reporting, outcomes report, improvement report, test results



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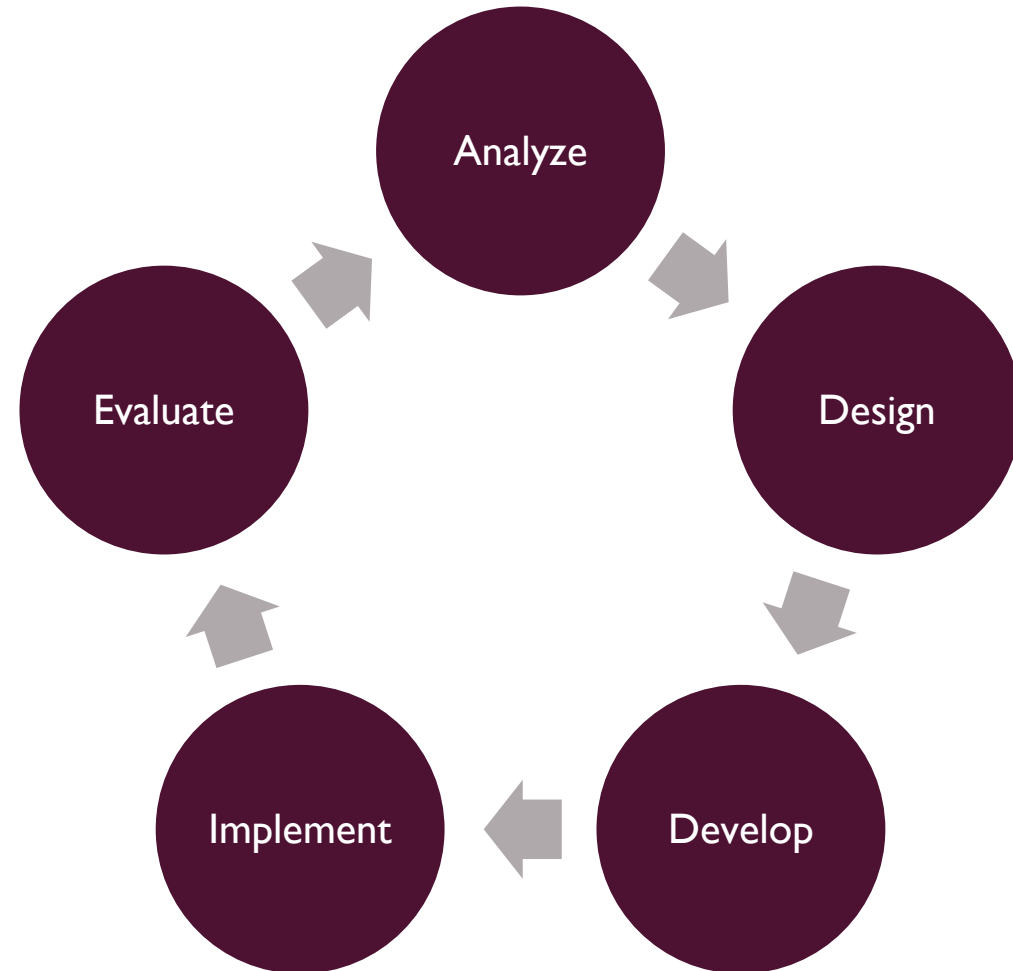
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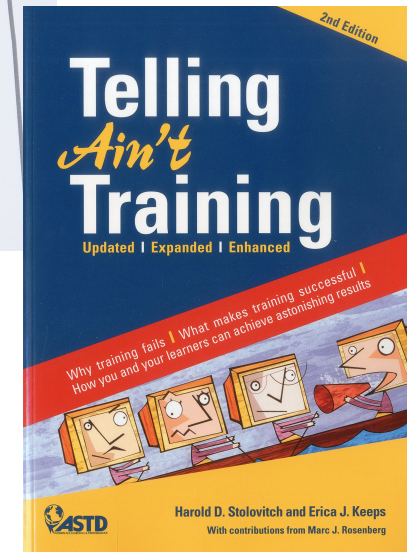
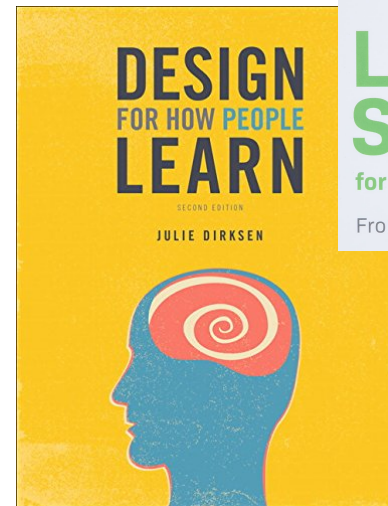
HOW TO GET STARTED IN INSTRUCTIONAL DESIGN

THREE WAYS TO GET STARTED
TODAY

I. START READING...

ABOUT LEARNERS, LEARNING, AND PSYCHOLOGY

- Julie Dirksen, “Design for How People Learn”
- Clark Quinn, “Learning Science for Instructional Designers”
- Harold Stolovitch and Erica Keeps, “Telling Ain’t Training”



2. START OBSERVING...

TRAINING, ELEARNs, FACILITATORS, AND MANUALS

- What works? Why?
- When are people most engaged? Why?
- What is effective in driving performance, attitude, or skill? Why?
- What could be improved? How?
- What tools are being used?



3. START CREATING... LEARNER PERSONAS, STORYBOARDS, COMMS PLANS, AND MORE

- How can I bring my current skillset to the team?
- How can I begin learning about learning?
- What are some past examples I can emulate?
- What documents could add value to the ID processes and work around me?





YOUR TURN

LET'S CREATE A LEARNER PERSONA



WHAT IS A LEARNER PERSONA?

A set of audience segment descriptions that helps learning teams better understand relevant issues and preferred learning styles in order to provide more meaningful experiences



LAGHARI, Maurice

13 years old
Asian American Freshman in High School
who wants to become a programmer

WORKS: Yes
VOLUNTEERS: No
HOBBIES: Programming, YouTube vlogging
FREE/REDUCED LUNCH: No
FIRST GEN COLLEGE TRACK: No
FAVORITE TECHNOLOGY: Laptop

MOTIVATIONS

- To get accepted into an ivy league university
- To make family proud

GOALS

- Earning a college degree in Computer Science
- Growing family business
- Become American citizen
- Work for Google

CHALLENGES

- First generation Asian-American
- ESL learner
- Muslim

STUDY SKILLS:

- Maurice spends two hours per day studying after he finishes his homework.
- He prefers to study alone but gets bored and sometimes distracts himself on social media

COMPUTER SKILLS:

- Maurice has a computer and reliable internet access at home
- Publishes programming projects on GitHub
- Troubleshoots computer issues for the family
- Uses Social Media to connect with other programmers

ENVIRONMENT:

- Middle class suburb in Queens.
- Blue collar and white collar
- Close-knit community

THINKING PATTERNS:


- Maurice is a self-proclaimed "nerd" but he is relatively popular
- Maurice likes school but has little interest in subjects outside of STEM

STORY

Maurice is from a middle class family that recently relocated to Corona Park, Queens. His parents are very strict but they allow him to have free time with

"I was nervous about starting high school, but so far things are going well."

Name, Sketch, and Behaviors



Olivia is new to the team and is consistently looking for new content to learn.

She has lunch with a member of the team nearly every day, and prefers not to eat alone.

Prior to working at AWS, Olivia was technical support supervisor at another tech company.

Needs and Pain Points

While her soft skills are very strong, Olivia feels as though she's behind the curve on her technical skills. She's rapidly ramping up and learning about AWS services and technology.

She learns best by doing and often has a difficult time reading a document and comprehending the full context.

Olivia doesn't like to be alone and really needs feedback from her peers in order to feel successful.

Demographic and Psychographic Detail


Degree in Communication from WSU

26 years old – Single


Technical Account Manager (L4)

Ran with AWS for 6 months


Reiss Profile




Acceptance: the desire for positive self-regard



Social Contact: the desire for companionship with peers



Eating: the desire to consume food



Status: the desire for respect based on social standing



Barbara Lewis

Age: 52

Job Title: Team Lead

Time in role: 17+ years

Job Function

Over her 17-year experience, she's built customers, kept them engaged, and a team.

Defining Traits

Biography

Barbara has been working in retail for over 25 years. She has been a retail team member at Target Ward for over 20 years. Her previous employer was another retailer in the area. Barbara is helpful, attentive and knowledgeable. All of her customers are a great team lead.

The first 20 years of her life were spent in the house. She and her mother spent time with her family and volunteering her time at her church.

Goals

- Save for retirement
- Retire at a place that's healthy work environment for her and her team
- After her customers leave the store with a lasting positive impression
- Show her customers' positive team members to grow and take responsibility on their roles

Pain Points

- Business change through the company's corporate culture after long-term experience in the store
- Struggle with discipline
- Often experience during training by her team and working with team members

Motivators

Achievement

Power

Stimulate

App

Growth

Social

Attitude Towards Training

Training is a budget and powerful tool for getting the whole team on the same page. However, she wishes she could spend more time on the floor with the customers.

Learning Preferences

- Hands-on learning and one-on-one coaching
- Hands-on learning and learning by doing

"If everyone pitches in and does their job right, everything works."

WHAT'S USUALLY PROVIDED IN A LEARNING PERSONA?

- Job title/division, % makeup of entire organization
- Typical job description
- Typical personality traits of people in this role or those who excel in this role
- MBTI or other personality inventory style
- Direct quote from someone in this role
- Preferences:
 - Communication tools
 - Learning styles and tips for engagement
 - Motivations
- In a dilemma (what would they do?)
- Relevant topics
- Challenges and barriers
- Learner journey

STEPS TO COMPLETE THE ACTIVITY

Consider

Consider the context of a recent training you've completed. You've just learned that training is going to be revised.

Assume

Assume you've been asked to create a persona to represent your department/role/team to help IDs understand their audience.

Create

Create a persona slide that can be used to understand your selected group's preferences, attitudes, and relationship to the training content.

TOBI DAY



PERSONA TEMPLATE

AGE 26
OCCUPATION Record Store Manager
STATUS Single
LOCATION New York, NY
TIER Enthusiast
ARCHETYPE The Maestro

Ambitious Admired Focused



"If I had a way to share projects and collaborate in real time, that would make my workload so much easier to manage."

MOTIVATIONS



GOALS

- To grow a strong industry reputation
- To build an audio-pro portfolio
- To keep track of everything

FRUSTRATIONS

- Slow download times
- Data crashes
- Poor communication

BIO

Tobi has a day job at a record store, but on the side she does all kinds of production work for up-and-coming artists. She never hesitates to learn something new and she often acts as tech support for her friends and clients. She is usually working on a dozen projects at a time and is trying to establish herself in the industry, so she hates data crashes or anything that makes her look bad. Because she works alone and in her home, collaboration is everything.

PERSONALITY



TECHNOLOGY



Audi

Coca-Cola

SONY

PreSonus

STILL WANT TO KNOW MORE?

- Read, observe, and create ID work
- Connect with IDs in your org or network
- Join the Instructional Design & Learning SIG (STC)
- Join us for upcoming webinars:
 - ADDIE: Who is she, and why should instructional designers care?
Saturday, January 21, 2023
IDL SIG, STC
 - Revisiting ADDIE: Finding value in what instructional designers might be missing
March 2023
IDL SIG, STC
- Contact me:
jennifer@anypso.com

