WHAT IS INSTRUCTIONAL DESIGN (ID)?
MOVING FROM TECH WRITER TO INSTRUCTIONAL DESIGNER

INSTRUCTIONAL DESIGN & LEARNING SIG
SOCIETY FOR TECHNICAL COMMUNICATION

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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

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

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).

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

**A**nalyze

**D**esign

**D**evelop

**I**mplement

**E**valuate
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
BIG PICTURE: INTRODUCING ADDIE

A - Analyze
D - Design
D - Develop
I - Implement
E - Evaluate
HOW TO GET STARTED IN INSTRUCTIONAL DESIGN

THREE WAYS TO GET STARTED TODAY
1. 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.
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
Consider the context of a recent training you’ve completed. You’ve just learned that training is going to be revised.

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

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

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

Motivations
- Incentive
- Fear
- Achievement
- Growth
- Power
- Social

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.

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