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Overview of the Design Process

This chapter will help the developer to:

- Identify essential steps in the training design process
- Locate where materials development fits into the design process
- Use a ten-part training plan as the blueprint for materials development
- Present the plan to management and gain approval

Exhibit

- 1.1. Three Phases of Design

Essential Steps in the Training Design Process

Designing a training program usually takes three phases: planning, development, and evaluation and revision. See Exhibit 1.1 for a picture of the three phases. Typically, a decision to develop a new training program comes from the installation of new equipment, changes in a process or procedure, or as the result of a performance deficiency.

Phase One, planning, begins with an evaluation of a person's or group's performance accompanied by interviews and observations. Review a job description to be sure it is current, and also review job standards. Through these observations, develop a task analysis to describe the appropriate way to complete a task. Write a target population analysis to identify what you know about this group. Write course objectives and decide whether there are prerequisites to attending this course and how you will evaluate whether the course participants meet these prerequisites. Create a strategy to decide how you will evaluate whether course objectives are met and whether the training course you are about to design will meet the business need that prompted course development. Summarize all the planning information in a ten-part training plan, described later in the chapter.

Phase Two, development, begins with writing a broad content outline of the essential elements that will help the learner meet the course's objectives. Next, identify the appropriate sequence of content elements. Flush out and refine the content and identify learning methods that are appropriate for this target population. Determine the best sequence of the variety of learning methods. Develop learning activities, exercises, tests, and handout materials. If appropriate, write a script for supporting audiovisual materials and write a lesson plan. Pilot the class to determine whether the learning objectives, and therefore the business need, will be met from the course.

Phase Three, evaluation and revision, uses the four-level model created by Dr. Donald Kirkpatrick (1998): assess the reactions of the learners to the course; decide whether the learning objectives have been met through new knowledge, skills, and attitudes; identify whether new learning transferred to the job; and check whether bottom-line results are met.

Where Materials Development Fits into the Design Process

Materials development, or writing terrific training materials, occurs in Phase Two.

Exhibit 1.1. Three Phases of Design

1. Planning

Review performance evaluations

Conduct interviews and observations

Complete target population analysis

Determine course prerequisites

Identify prerequisite evaluation methods

Write a training plan

Review job description

Create or update job standards

Complete task analysis

Write course objectives

Strategize a means to evaluate methods

2. Development

Develop broad content outline

Refine content

Sequence methods

Evaluate the pacing of activities

Pilot course

Sequence and group broad content

Select methods

Develop learner activities, exercises, handouts, and tests

Complete lesson plan

> ### 3. Evaluation and Revision
>
> Reaction of learners
>
> Learning new knowledge, skills, and attitudes
>
> Transfer of new learning to job
>
> Bottom-line results

A Ten-Part Training Plan to Use as a Blueprint for Materials Development[1]

Following the completion of one or more needs analyses and the steps in Phase One of the design process, a training plan is usually written to report the results of the analyses and to meet projected training needs for a group of employees (such as first-line supervisors) or for a period of time, such as for the coming year. Sometimes training plans are called performance improvement plans to demonstrate that more than training solutions are offered. A complete training plan often offers non-training solutions as well.

Here are the ten parts of a training plan, along with references to which type of analysis would develop each type of information.

1. Define the Issue

Define the issues that are related to a business need that training can address. For example, for either of the following issues it would be appropriate to develop a training plan.

- How can we successfully open ten new stores with the current skills of the assistant store managers who would be promoted to store manager?

- Middle managers have no advanced training beyond what they received when they became supervisors.

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[1]Complete information for a training plan is in Chapter 10 of *Training Needs Assessment* ©2006 Jean Barbazette, reproduced by permission from Pfeiffer, an Imprint of Wiley.

Often the issues are identified by completing a *performance analysis.* Remember to offer non-training recommendations where appropriate.

2. Identify the Need

Some organizations become trapped into putting on training programs because they are popular or requested without regard for linking training to a business need. Often a request for time management, stress management, or communication skills indicates "needs" that ought to be sorted out from "wants." Identify how widespread the "need" or "want" is and whether or not it is related to job performance.

A *needs versus wants analysis* develops this type of information.

3. Contract with Supervisors

How will supervisors or managers of those attending training be included in the planning and follow-up for improved performance? Define the role of the supervisor or manager of the participants and identify how to prepare them to reinforce the training.

4. Identify/Establish Performance Standards

Often, training is requested to improve performance. Are there performance standards to use as the goal for a minimum level of acceptable performance? The operational area, not the training function, has to establish job performance standards. It becomes difficult to train if vague or no standards exist. ("Just make them more professional" is an example of a request that may or may not have an agreed-on standard of acceptable job performance.)

Information related to performance standards is developed from *job/task analysis, performance analysis, and goal analysis.*

5. Identify Trainees

Who is to be trained? What job classifications do they hold and how many people need training? *Target population analysis* develops this type of information.

6. Establish Training Objectives and Training Evaluation Criteria and Results

Decide how you will know the training was successful. How will learning and new skills be evaluated? How will you tie training to bottom-line results and back to the business need that dictates the training?

This information is developed by conducting a *performance analysis and needs versus wants analysis.*

7. Determine the Cost of Training

What are the costs to assess the need for training, design the training, develop learner and instructor materials, present the training, and evaluate the training? Are the costs worth the benefit?

A *feasibility analysis* develops this type of information.

8. Select/Develop the Training Program

Decide whether you will present an existing program or buy a packaged training program. Decide whether you will use internal subject-matter experts as developers/trainers or hire an external consultant, designer, or trainer. No needs analysis tool is used to answer this question completely.

Perhaps a *contextual analysis* can answer some of the issues around program selection.

9. Schedule the Training

What time of the day, week, month, quarter, or year is best for this type of training? What are the consequences of training "on the clock" or on the employees' own time in your organization?

Contextual analysis develops this type of information.

10. Evaluate the Results

Apply the criteria using these four levels and objectives from Number 6 above:

- Participant reaction (measured in the classroom or in an online survey following training)

- Learning (measured in the classroom)

- Job performance (measured in the workplace)
- Results (based on the business need identified in Number 1)

How to Present a Training Plan to Management and Gain Approval

How a training plan is presented to management (or to the client) to gain approval depends on the decision-making process in each organization. If the internal client who requested a training plan or some type of needs assessment is the management decision-maker, ask the client what type of information he or she needs to make a decision. What amount of discussion and detail is sought? Does the client prefer to see a summary of data or both a summary and raw data from which the summary is drawn? Does the client prefer to make decisions from the data or to select from recommendations made by the trainer conducting the needs analyses?

Since most training plans are complex, it is helpful to provide a one-page overview and allow time to read the plan prior to discussing it. Provide a copy of the plan to managers at least a week before the meeting to discuss the plan along with a proposed agenda or questions for discussion. Most plans need some additional explanation and discussion before budgetary approval is given.

Often, presenting parts of the training plan visually can help clarify what is or is not a part of a training plan.

Next Steps

The presentation of a training plan is both an ending of one process and the beginning of another. Once decisions are made from the training plan, identify who will follow up on those decisions. How will this information be handed off to the course developer? How will management inform the target population of the training and non-training solutions selected to address the performance issues? Who will coordinate and implement the decisions made from the training plan?

This book will address the development of training materials listed in Phase Two of the design process.