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9471 Instructional Design
Reflections

Reflective Writing

1. Data and Feedback from Using Materials with Pilot Users

   My Pilot Subjects: I conducted the session with 3 individuals. AA is a member of our inside sales team. This person is relatively new in the position and has had some sales experience prior to joining the company. The second person NT is a member of my team who is an Account Manager. She has almost no sales experience. The third person AP is a newer salesperson who has gone through our current start up training. She has a bit of sales experience as well but is struggling currently and we felt it would be a good refresher. Due to the timing of this exercise, there were no new hires I can practice on.

   None of my pilot subjects were new PCs and I believe that having a group with no experience with the company would have helped me better decide on what was useful and was not. At times it was hard to tell whether or not the lesson structure worked to convey information or if they were pulling from prior knowledge. For example, when we went' through Overcoming Objections, everyone had the "right" answer. We didn't use the objections worksheet at all. With a new group of PCs I think it would be helpful to do the worksheet first *before* referencing manual so learners can give me their initial thoughts on how they would overcome objections. Or I might even take it a step further and ask them to brainstorm what they think bride's would object to and then from that list have them go to the worksheet with the most common objections.

   The most telling exercise that shows me how effective the training was is the final role-play. Again, it was hard to really assess whether or not the role-play went well because of prior knowledge or because of the training. One thing that worked well though is the peer-feedback process using the rubric. Though the rubric needs to be flushed out and made clearer, having guidelines of how to evaluate the exercise was quite helpful.

   In hindsight, I would definitely try to work out timing for trial runs where I can test the material with at least one person who is part of the intended audience. However I did find that my subjects were able to give me a lot of feedback a new PC would not be able to.

2. Design Process
   During the design process I used the Instructional Approach Plan I created in week 6. The Backwards Design process was really helpful in thinking through how to structure the training. Identifying the end result and being asked to write my objectives really helped me see what types of exercises I should design. I've never thought about how a good objective/goal should be written and having then stated in observable terms really made a big difference. What I appreciated the most about this course was learning about the structure and process around design. As I was going through the different design elements and steps I could see that a lot of the items presented I was applying to past training sessions I've designed but I never followed any process or did things in a deliberate manner. I found listing out assessment tasks and instructional strategies extremely beneficial especially when coupled with the reasoning behind them. For example, this is what I wrote about why I was using pre-training exercises:

   > *The pre-training exercises serve several functions. First, they introduce the learner to the objectives and it sets the stage for the in person training while testing for prior knowledge. Secondly, reviewing the exercises will*

give the trainer a good idea of where the learner stands and if he/she will need to adjust pace or content to adjust to the learner. Lastly, the pre-training exercises allow the training session to focus time on skill building vs. information sharing (history of company, etc) while still passing on essential information.

Writing this out made it a deliberate choice and not an afterthought, which is how I've designed I the past. Giving the "why" behind the action is helpful to me because it helps me commit it to memory and hopefully will lead to my future as an informed designer who makes thoughtful, deliberate choices that can be backed up with reason and logic.

Some of the key decisions I made were as follows. I won't spend a lot of time explaining why I used the strategy here because I feel I am pretty clear on the reasoning on my sketch pad.

- ➔ Integration of pre-training exercises – This was mainly to save time. In a short intense 2 day period, I gathered from my assessments that too much information was covered and learners were not retaining as much as they could during the live training.
- ➔ More reflection/assessment exercises throughout the training – Start up training as it existed before was sharing information and largely lecture based. Even the exercises that did exist were not based on scaffolding methods. I tried to incorporate more of that so that there was elements of direct instruction and guided practice followed by testing of knowledge and reflection. This is why I built in the trainer conducts a full role-play while the learners observe and use the rubric to rate the trainer and also the informal checks for understanding and self assessment. Truth be told, I never gave a lot of credit to reflection b/c it's the part I always skip but being forced to do it in this class I truly see the benefits and am a convert! Now I just have to make it habit…
- ➔ YCCDI – This simple strategy was new to me and I loved it! I clearly see when someone is new to skill how intimidating it can be and how one can be much more open to learning when they see that they can achieve the end result.

In thinking about where I stand in regards to being an informed or a beginning designer I do think I'm on the road to being informed! I shared this earlier but for me, I will know that I've gotten there when I can make deliberate, informed decisions and utilize a systematic method for design that I can articulate and explain, every time. Though that's not on the Design Strategies Table, I know for me this is critical but will also be the toughest! I look at the Design Strategies Table now and can see a conflict in what I know is right and now can do, vs what my natural tendencies are especially when under a deadline with limited time. Specifically here are the phases I will be challenged with:

- o Premature/Delayed Decision Making – Management has a tendency to think they know everything that's going on and will often times propose a training module and give me a deadline expecting immediate execution. I have to make sure I'm not making premature decisions and that I don't begin to build curriculum before going through the proper steps. I know that skipping this part of the process can lead to unforeseen issues that will ultimately delay the project

- o Skip/Do Research and Info Searches & Confounded/Valid Investigations Again, to save time, my natural tendency is to skip doing this in a thorough manner. I think a lot of this has to do with the fact that in the courses I've designed in the past I've also been the SME and did not feel that I needed to research as much. Now I know that even as the SME it's important to verify whether or not my views are consistent with others. This phase will also be critical when I'm asked to design a course where I'm not the SME.

- <u>Tacit/Reflective Thinking – </u>Discipline is key here and this is the step that I skip most often. The biggest reason is that I'm not held accountable to this and usually once a project is done, I have to move on to the next. I proposing timelines for project completions I really need to build this into my timeline

The areas that I feel I've made the most progress and will be able to build upon without as much effort are:

- <u>Idea Fixation/idea Fluency- </u>Going through the sketchpad exercise and also having others review my work helped me see that it's not a good idea to take an idea and run with it until it's been thoroughly thought though
- <u>Haphazard, Linear/Iterative, Managed Design – </u>Having the ADDIE and Backwards Design Model to follow have done wonders in helping me see how I can work in a managed way.

<u>Instructional Strategies Table</u>

Objective	Instructional Strategies	Rationale	Results
Hook the learner	WIIFM/YCDI	Foshay Ch 3, pg 44	This was a really helpful exercise that put people at ease and more open to receiving new information
Review Prior Knowledge To Help Trainer Tailor Course if Needed	Pre-Training Exercises	Foshay Ch 3 pg. 44	Allowed me to see 1) Learning Habits – who followed directions? 2) Depth of knowledge – will I need to spend more time on certain parts of training than others?
Direct Instruction, learn the 7 steps to a model meeting	Organizing and Chunking	Smith and Ragan pg. 155, Foshay Ch 2., Wiggins & McTighe pg. 225	The training was organized linearly, in the way a sales meeting would be carried out. This way, PCs could visualize how the meeting will occur. Chunking was used when reviewing information such as Package Options and objections
Make Learning Relevant	Tailoring	Wiggins and McTighe pg 224	I had the person with the most sales knowledge help me out in exercises and share knowledge. I think that helped him not feel like training was a waste of time and the others learned a lot from his experiences.
Setting the Stage, Construct Meaning on why Sales is Important	Equip Students, Establish Purpose	Wiggins and McTighe pg 218, Smith and Ragan pg 132	Talking about the 4 motivating factors was good and helped the PCs see the bigger picture about why sales is important. Knowing what motivates them also makes it easier to manage them in the future

Assessment Strategies Table

Objective	Assessment Strategies	Rationale	Lessons Learned
Have learner be able to correctly recommend packages and products to client	Case Studies	Smith and Ragan pg. 230-231	Case studies are a really good way to see the thought process used in evaluating the client and what would work best for them.
Be familiar with package names an offerings	Recall Items	Smith and Ragan pg 115	We didn't formally do this in the quiz format as I had intended. Part of this was because they were already familiar with the packages since they were not new employees. As I've mentioned, next time around, I see how important it is to do a trial run with your intended audience because only then will you see if something truly works or not.
Be able to conduct a client meeting using the consultation guidelines	Simulations/Role-play	Smith and Ragan pg 233-234	Really allowed me to see where learners were in their practical application of the subject matter. Immediate feedback after the sessions allowed me to put people back on track if needed and address learning gaps. In my design process I had developed a goal setting session that would come out of this where learners would use work on those goals with their managers. We didn't do this but I still think that would be a good idea.
Be able to overcome objections	Evaluate and give feedback using the Overcoming Objections Worksheet, Simulations/Role-Play	Smith and Ragan pg 196 and pg 233-234	This was a good part of training. We ended up not using the worksheet very much but the role-play was very telling in terms of what the learners were able to synthesize from the lesson.
Evaluate learning	Self Assessment	Wiggins & McTighe pg. 221, 222, Key Findings article, pg 13 (Metacognition)	This is nice because in addition to the value in having learners evaluate themselves, it allows you to see whether or not you and the learner are on the same page. It's immediate feedback to the trainer in terms of whether or not they were clear in their feedback and recommendations. It also helps trainer re-adjust the lesson if needed to fill in any gaps that may arise.

Final Sketchpad

Here is my updated sketchpad. Changes and comments are highlighted in yellow.

Intended Learning Outcomes/Instructional Goals

- Learners will be able to conduct a client meeting following the 7 steps of a model meeting and score a minimum of 70% on the meeting observation checklist.
- Learners will be able to overcome the most commonly given objections
- Using a consultative approach, learners will be able to recommend the best package for a bride by linking features to benefits
- Learners will be able to describe the primary differentiating features of each package
- Using the Consultation Guidelines, learners will be able to ask questions to gather information on a bride's wedding day and understand their unique needs

- Photography Consultants will be able to conduct a client meeting following the 7 steps of a model meeting and score a minimum of 8 out of 14 possible points on the meeting observation checklist.
- Using a consultative approach, Photography Consultant will be able to recommend the best package for a bride by linking features to benefits
- Photography Consultant will be able to describe the primary differentiating features of each package
- Photography Consultants will be able to overcome the most commonly given objections

These are the ILOs I ended up using for the training

Assessment Tasks

- **<u>Review of pre-training exercises</u>**: Towards the beginning of the session, the trainer will review the Learner's pre-training exercises to probe for current knowledge and understanding of material. Pre- training exercise will include:
  - Read background and history of the company
  - Review and be familiar with the basic meeting outline
  - Review and be familiar with the names and components of each package
  - Complete the Pre- Training questions:
    - ➔ What brought you to our company?
    - ➔ What excites you most about being a photography consultant?

  The pre-training exercises serve several functions. First, they introduce the learner to the objectives and it sets the stage for the in person training while testing for prior knowledge. Secondly, reviewing the exercises will give the trainer a good idea of where the learner stands and if he/she will need to adjust pace or content to adjust to the learner. Lastly, the pre-training exercises allow the training session to focus time on skill building vs. information sharing (history of company, etc) while still passing on essential information.

  As I commented in the main portion of my project, this section went well and I think will be a valuable part of the training going forward.

- **<u>Constructed Answer Items:</u>** Given a case study of different client profiles, the learner will be asked what package he/she would recommend to the bride. The case study will be written but the answers will be given verbally by the learner. Learner must identify the recommended package/s best suited for the client and iterate to the trainer why it was chosen.

This exercise tests the learner's ability to synthesize various pieces of information including product/package knowledge and problem solving ability.

Each learner gave the same answer as to which base package to recommend. I think that perhaps more case studies need to be written or written differently so it's "harder" or at least will lead to a more stimulating discussion on why the learner would recommend one package over another. Or, it would be nice to build in questions that the trainer can ask to flush out the thought process more. For example: What information did the bride give you that lead you to your decision? Are there other packages you would recommend and why? What other information would you need in order to determine if another package was more appropriate?

- **Recall Items**: Administer a quiz to test for knowledge of packages (names of package, price and major distinguishing factors). This will be a written quiz given at the end of the first day.

  This section was not included. When I was designing the course, I felt that going over the worksheet of packages was enough. However, I may add this back when the training is incorporated into the full 2 day schedule. I still think this would be helpful to review day 2 to make sure learners remember key info.

- **Simulations:** The final test of knowledge will culminate in a role-play. The learner will conduct a full meeting with the trainer playing the role of the bride. The trainer will evaluate the learner using the meeting observation checklist as the rubric for grading.

  The role play will be the primary assessment item used and will provide the trainer with the best understanding of how much the learner has absorbed and where their skill level is at. The role-play results will help the trainer make recommendations for continued training post start up training.

  Upon reflection of the project, I think a really helpful insert would be a feedback worksheet for the trainer. Not all manager/trainers who will be delivering this are good at this skill and follow-up to this exercise is key. I commented in the main section that I would like to add a goal setting session afterwards so a learner can focus on specific steps of the sales process they need to focus on. In addition, it would be nice to have a worksheet or even a list of questions that the trainer can refer to help them make good decisions about what type of goals are appropriate to set. The more I think about this, giving feedback and goal setting can be a separate training module in and of itself!

- **Informal Checks for Understanding**: Leading questions will be written for the trainer throughout the training manual to test for understanding.

  These were not written into the trainer's guide and I think it's because I was leading it and instinctually knew when to ask questions to check for understanding. However, when writing a trainer's manual that will be used by others it is important to be as explicit as possible. In my next revision, I will include these.

- **Self Assessment:** A brief self assessment will be given to the learner at the end of day 1 as homework. The 2 questions learners will answer are:
  - ➔ Which step(s) in the model meeting are you most comfortable with at this point?
  - ➔ Which steps are challenging

The self assessment serves as a way for the learner to reflect on the days activities and will also provide feedback to the trainer at the beginning of the next day's session. The answers provided will guide the trainer to review any necessary material the learner is still struggling with.

Instructional Strategies

This segment is part of a 2 day start up training and makes up the largest and most important portion of the overall session. The learning will occur sequentially and follow the same timeline as an actual client meeting. There are items I have left out of this timeline simply b/c it will already have occurred prior this segment (welcome, reviewing agenda, company history, etc).

The Hook/WIIFM: Trainer will begin by review the pre-training questions to gain insight into what motivates the learner. After a brief discussion, trainer will describe the positive benefits of completing a sale. The benefits will be positioned around the 4 main motivating factors that people have (money, having a positive impact, be a part of a growing organization, personal development). Benefits shared will include:

a. More closes mean a higher commission check
b. The opportunity to work with more brides to and be a part of a life changing experience for them
c. Helping grow our company and giving more opportunities to local photographers
d. Building personal sales skills and how they can use these skills in their career path and personal lives

Based on the pre-training question discussion, the trainer will be able to link which motivating factor is most pertinent to the learner.

YCDI: Trainer will link key selling skills to aspects of the learner's life where they may already be using these skills. Primary skills touched upon will be: persuasion, describing, listening and overcoming objections. The trainer will ask the learner to recall a time when they had to convince a friend or a family member to either so something they did not want to do (go to dinner with them, take a trip, see a movie, etc). After the learner tells the story, the trainer will highlight how they "sold" their friend on it using classic sales techniques. If learner(s) are unable to recall any situation, trainer will use a pre-prepared story of their own and ask learner to pick out key sales elements used. Trainer will then explain that most people have natural selling abilities even though they may not recognize them as such.

Review Relevant Prior Knowledge: Trainer will follow YCDI with a brief discussion of the readings given as part of the pre-training exercise. Questions asked will include:

- What do you think are the major reasons brides should reserve with our company? What do you think sets us apart?
- What do you think about our packages and offerings?

Direct Instruction: Trainer will introduce the concept of consultative selling and the difference between that and product based selling. Trainer will link the 7 steps of the model meeting to the 4 step of the consultative process.

Build Rapport

1) Introduction

Understand the Need

2) Probe and Connect

    3) Present Company
    4) Review Portfolios and Albums

Make the Recommendation

    5) Present Packages
    6) Address/Overcome Concerns and Objections

Close the Sale

    7) Closing the Sale

After reviewing how the 7 steps link to the consultative process, trainer will deep dive into each segment.

1) Introduction: Trainer will describe the basic elements about how to complete this phase. It will be broken down into actions vs. rapport building tips
    a. Actions: Offer to purchase a drink for the clients, set the agenda, show them the photography slideshow
    b. Rapport Building Tips: Make eye contact, smile, be enthusiastic and personable
2) Probe and Connect: Trainer will review the Sales Consultation Guidelines (list of questions the consultant will use to conduct the needs assessment of the client). Trainer will also tell the learner what type of information they must gather by the end of this segment in order to make a proper recommendation. During this section, trainer will ask the learner why certain questions are important to ask.
3) Present Company: Trainer will review the "Key Talking Points for the Client Meeting" grid as well as the sample script with learner on how to present and position our company.
4) Review Portfolios and Albums: Trainer will describe the collateral available for client viewing and tell learner why each tool is used
    i. Portfolio: Ascertain client preference for style of photography
        1. At this time trainer will review the "Print Reviewers Guide" to give learner talking points for each photo.
    ii. Albums: To show clients what is available to them

This section needs to be flushed out more. Specifically, I am not sure what the best timing is to share album/portfolio info. Before this section can be conveyed well, PCs must have product training. Most likely this will be covered in the beginning of start up training prior to sales training. In my pilot session, this was not an issue b/c all learners have been exposed to our offerings and they had no problem presenting our products.

5) Present Packages: Trainer will review the package offerings with the learner and together they will complete the "Key Distinguishing Factors" worksheet to help learner understand when to recommend certain packages and why. Case studies will be reviewed after the worksheet to test for learner's ability to recommend the right package based on client needs.

Learners really liked the Key Distinguishing Factors worksheet and asked for a formal insert. They wanted one with pre-filled in answers that they could refer to going forward.

6) Address/Overcome Concerns and Objections: Trainer and Learner will complete the "Common Objections" worksheet together and discuss how to best overcome objections.

7) Closing the Sale: Trainer will describe successful closing tips and will review the sample closing scripts with the learner.

Modeling/Guided Practice: Trainer will review the meeting checklist rubric used to evaluate consultants during observations. Trainer then completes a reverse role-play with the learner where the trainer plays the consultant and the learner plays the client. Learner will evaluate the trainer using the meeting checklist. After the exercise, trainer and learner will de-brief on the role-play.

The meeting checklist rubric needs some work. As previously mentioned, parts of it were unclear and learners were not quite sure what rating to put at certain times of the role-play. The checklist is a tool I didn't have time to get feedback on before I used it. I will certainly solicit feedback from other SMEs when re-vamping this.

Homework: Give learner self assessment questions for homework. Tell them to review materials presented during the day to prep them for the final assessment role-play on day 2

***** END OF DAY 1*****

Recap: Review self assessment questions and administer quiz on packages to test for understanding (quiz will be written but trainer can administer orally if desired). Review results and answer any lingering questions that learner has from material presented on the previous day.

As mentioned, we didn't have a quiz during the pilot but I would like to include one

Final Assessment: Learner will conduct a full meeting role-play to see how well they have integrated the material taught. The meeting checklist rubric will be used to evaluate this segment of training. After the role-play, trainer will give feedback to the learner and debrief him/her on results. Based on the results, Trainer and Learner will decide what development goals the learner will work on with their manager for the next month or until re-evaluation time.

Time Capsule

The time capsule represents some key learnings that I would like to remember as I continue growing into an informed designer.

- The design model that I think I will follow is ADDIE, Analysis → Design → Development → Instruction → Evaluation.
- I also like the Stages of Backward Design: 1) Identify Desired Results 2) Determine Acceptable Evidence 3) Plan learning experiences and instruction
- Some things for me to remember during different phases of design:

    Analysis:

    - Pay attention to the potential users, learning environments & perceived need for instruction
    - During front end analysis the three basic components are
        - The Instructional Context
        - The Prospective Learners
        - The Learning Task
    - During needs assessment, you find out whether or not instruction should be designed, to determine if there is an actual need for instruction
    - Review pgs 44-48 of Smith and Ragan for conducting needs assessments for A) The Problem Model – "crisis" model, we need training NOW! B) The Innovation Model – Changes or innovations in an org. that determines whether or not new learning goals should be added C) Discrepancy Model – Learning goals already identified and instruction currently exists, where do the gaps lie and how to address them?
    - Learning goals are statements of purpose of intention, what learners should be able to do at the conclusion of instruction. These can be lesson, unit or course goals. Objectives are subparts of goals
    - Good goal statements are effective when written in observable terms and should include: description of learning, description of conditions that demonstrate that action, description of the standard
    - Task analysis – This process helps you come up with the objectives, the subparts of the goal
    - The designer is not always the Subject Matter Experts (SMEs)

    Design:

    - A good time to write assessment or test items is immediately after writing the objective
    - A learning/instructional strategy is anything you do help learners achieve the objective including things like, have clearly written objectives, WIIFM, setting expectations with them, etc.
    - Informed designers practice idea fluency, they do not fixate on first design ideas and work in depth in developing a single plan
    - Keep in mind that every design requires compromise, as the designer, I must decide how to weigh pros and cons
    - "Superficial learning by trying to do too much in too little time doesn't make for a lasting learning experience for the participants", KISS it's not always

necessary to tell/teach the learner everything there is to know about the subject
- Keep in mind how you should design a course if you know you will have a mixed level audience. How do you prevent beginners from feeling overwhelmed while making sure the advanced participants aren't bored?

Development:
- This is the stage where I usually do not ask for feedback but need to. Reviews at this stage will help flush out anything before it's implemented and may save a lot of time
- Along with WIIFM, a great strategy is YCCI (You Can Do It)
- WHERETO:
    - W where are we going, why, what is expected
    - H how will we hook and hold student interest?
    - E how will we equip students for expected performances
    - R ho will we help students rethink and revise
    - E how will students self-evaluate and reflect on their learning
    - T how will we tailor learning to varied needs, interests, styles
    - O how will we organize and sequence the learning
- Help learners relate to what they already know
- When developing the lesson, remember to consider the Structure of Content to keep them oriented to the big picture, Chunking to help learners store new information, Text Layout affects how easily learners can process, understand, store and retrieve what they have learned and Illustrations as pictures help learners recall information,

Implementation:
- Schedule time for a trial run with pilot subjects! This is invaluable to get real feedback on how your training actually works

Evaluation:
- Tacit and reflective thinking are critical to helping me develop my skills as a designer.
- Summative evaluations and following up with your learners is good customer service. Just because the training went well does not mean the course is designed well. What use is a good course if learners cannot apply what they've learned after the session? This you can't know unless you follow up with them.
- Create an effective peer review process, one that works well for me. Think about how I like to receive feedback, how to give it to me so it's useful (comments like "I don't love this part" don't give me much to go on!). When is it appropriate to use "track changes" in a word doc? If there is only 1 reviewer? It get's hairy when there are multiple "track changes" going on. I haven't asked for enough peer reviews to really figure out the method that's best but it is something I need to do. An effective review process will cut down on my time in making changes