HPT Solutions & Evaluation Plan

DelveDig Training

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Context & Performance Problem

DelveDig Training offers customized curriculum development to its clients who desire to present specialized training based on their area of expertise to the market. The services that DelveDig offers are highly desirable and complex. The instructional designers (IDers) that DelveDig employs are capable and dependable. The process that DelveDig uses, however, is not producing the client relationship results that it desires. The clients would like to see faster and more transparent training development process. Additionally, DelveDig learns about client complaints too far along in the development process to make changes that are relevant to the client. There is a gap between the current service that is being provided by DelveDig and the desired state of happy clients. In order to improve client relations DelveDig is hoping for performance improvement behaviors that will enable them to function effectively and efficiently ultimately better serving their clients. The specific performance gaps being addressed are listed below:

- Reduction of client complaints from 60% to 10% of all client interactions.
- Training development time requires reduction from a range of four to eight months to an average of three months.
- Deliverables that are viewable to the clients and allow for client feedback early in the design process (two weeks).
- A consistent, repeatable, specific internal instructional design process that each team follows.
- Instructional designer feedback system that provides rapid, continual, and meaningful feedback to IDers during the instructional design process.

Interventions

Intervention Category	Intervention	Justification
Performance Aid	Job aid: decision tree for escalating client complaints	The job aid will assist the instructional design team in identifying appropriate management of client complaints. The job aid will direct IDers to the proper documentations, as well as escalation process for persistent client concerns. This cognitive support tool (Molenda & Pershing, 2004) provides non-instructional support that IDers need to ensure proper management of client complaints.
Environmental	Provision of Information through: • A client-focused deliverable approach to instructional design through a newly created rapid development process • Establishment and communication of unambiguous performance expectations (Stolovitch & Keeps, 2004, p. 123) • Provision of timely and specific information to the individual on how she/he is performing (Stolovitch & Keeps, 2004, p. 123) in conjunction with enhancement of	The newly created rapid development process will solve the root cause of tools (Molenda & Pershing, 2004) that are needed by the instructional designers. The new process will encompass new deliverables based completely on the work that the IDers are already doing. The template forms will enable faster development from the IDers to the client, but still allow for the traditional, valued ADDIE process to be followed ensuring quality work product. Additionally, cognitive support (Molenda & Pershing,

	motivation through support systems	2004) is increased by the establishment of unambiguous performance expectations allowing the IDers to focus on the instructional design process and allowing them to reduce any efforts of thought on what the client needs to know. Organizational systems (Molenda & Pershing, 2004) are included in this new process as IDers receive feedback with more frequency as the feedback is tied to the client deliverables.
Emotional	Enhancement of motivation through support systems that build confidence (Stolovitch & Keeps, 2004).	The instructional designers are sufficiently motivated to perform their duties to the best of their abilities. Incentives such as bonuses are always a welcome addition by the employees; however, in this case the money would be wasted. The IDers are happy to do the job; what they need is more support in moving to the new training development process. The IDers need a feedback system that provides rapid, continual, and meaningful feedback to during the instructional design process so that they can make improvements to their work-product from

		one step to another. The feedback will come in the form of a support system that builds confidence in the IDers by providing them the support they need to transition to this new, more rapid pace deliverable-focused process. The root cause of organizational system (Molenda & Pershing, 2004) will be addressed by the enhancement of motivation through support systems.

Intervention Descriptions (Appendices A, B, and C)

Performance Aid: Job aid decision tree for escalating client complaints **(Appendix A)**

The job aid utilizes the Prezi software to enable IDers to become familiar with the new process for client complaints. Prezi was chosen as it is easy to use and provides dynamic decision tree for IDers to quickly ascertain appropriate steps to take for client complaints. A decision tree job aid was select because it is a diagram that enables the user to "easily find the item that tells you what to do or triggers your action" (Stolovitch & Keeps, 2004, p. 117). The steps of documentation for client complaint into client folder for the first complaint, escalation to the team manager after the second complaint, and details regarding client management are contained within the Prezi.

Environmental: Provision of Information **(Appendix B & C)**

The provision of information presented as the intervention for the performance gaps of shorter training development time, transparency to and proactive feedback requests from the client, and a consistent, repeatable design process is a new rapid prototyping process.

"The use of prototypes early in the development process stands in contrast to many development projects where the customer does not see the finished product until it is nearly complete" (Stokes Jones & Richey, 2000, p. 3). The process is based on the ADDIE model for instructional design but adds the client facing components necessary to creating and maintaining excellent client relationship. This particular process is informed by Shor's (2012) ADDIE+ model in which Shor (2012) comments on the similarities between the information technology field instructional design; "the creation of learning and performance solutions is dependent on software tools and delivery mechanisms, and it bears too much similarity to the IT industry, especially software development, to ignore" (p. 61). An advantage to this type of rapid prototyping is the formative feedback from the client that is solicited from the beginning of the project; contrary to traditional ID process where "the cost of making changes to a nearly finished project is often prohibitive" (Stokes Jones & Richey, 2000, p. 3). All phases of the instructional design process are included, but the instructional materials are presented in a storyboard format early in the development process, 2-3 weeks if possible. The phases of DelveDig's rapid prototyping development process are; essentials, storyboard, revised materials & evaluation plan, evaluation results & final materials review, and finished product. The client deliverables and internal process are described in chart format in Appendix B. Sample client deliverables are located in Appendix C.

Emotional: Enhancement of motivation through support systems that build confidence (Stolovitch & Keeps, 2004). **(Appendix D)**

The one-on-one meeting will be the main mechanism for the implementation of the enhancement of motivation through support systems. While non-instructional in nature,

the meeting will use confidence-building strategies from Keller (1987)'s ARCS model. The meeting will include; "criteria for evaluation of performance," as well as "help set realistic goals" and "opportunity to become increasingly independent in learning and practicing a skill" (Keller, 19897, p. 5). Currently no regular feedback is provided to IDers so the meeting will serve as the mechanism for this feedback to occur. The meeting itself however, is not enough to ensure support. The support will be given by providing meaningful feedback during the course of the meeting. The key components of the meeting are (1) evaluation of new process, (2) ID feedback, (3) ID support, and (4) evaluation of ID support (Appendix D).

Evaluation

Kirkpatrick's Levels of evaluation (Kirkpatrick & Kirkpatrick, 2006) were used in the production of this evaluation plan. These interventions are non-instructional in nature and therefore Level Two of the Kirkpatrick Evaluation model was not utilized.

Performance aid

Level One:

Managers will request feedback from ID team regarding the usability of the decision tree job aid. Comments will be requested about the job aid at a two separate team meetings. The instructional designers will each be asked:

1. Are you effectively using the client complaint decision tree job aid?
2. What changes can be made to the job aid to make it more effective?

The manager will record the information from the first meet after the roll out of the job aid and subsequently at a second meeting 2-3 months after the roll out of the job aid. A comparison between the two data points will be made to identify problem areas and/or

note improvement areas. Note that suggestions from the changes should be made after each meeting. The management team will determine if further data is needed based on the severity of the changes suggested and subsequently make changes to the job aid.

Level Three: (**Appendix E & F**)

The overall usage of the job aid will be tracked electronically using the Prezi software "views" function. Additionally, managers will review client complaint records for accurate use of the job aid. For example, if they receive an alert from an IDer, does it contain the appropriate information? Are IDers contacting managers when a second complaint is made? Are first complaints noted in the client file? Managers will maintain an electronic record of clients with complaints and notations of correct or incorrect compliance with procedures based on the job aid. See Appendix F page 1 for the Client Complaint Log.

Level Four:

As "measures are already in place via normal management systems and reporting - the challenge is to relate to the trainee" (Chapman, 2014, table 1). The records maintained in level three will be reviewed and related to the instructional designers in order support their individual performance improvement. Suggestions for improvement will be made based on client complaints process compliance gaps. If no gap exists, IDers will be receive positive feedback on their compliance and client management.

Environmental

Level One

Instructional designers are provided feedback on each client deliverable that they create. The feedback will be sent via email and discussed at the one-on-one meeting. Within the email, the following questions will enable reaction level evaluation from the IDer.

1. Do you understand the feedback provided on this client deliverable? Yes/No
   a. If no, what questions do you have?
2. Please describe in your own words what you will do differently, if any, the next time you encounter this deliverable/situation.

Level Three

The manager will create the reports Deliverable Feedback & Response Report, Client Compliant Log, and Client Complain Trend Report and Graph. The reports will be updated after each deliverable is given to the client and client feedback is received. The feedback will be presented in conjunction with client complaints. The reports, created by the manager based on information provided in the client folder, are viewable in Appendix F.

Level Four

During the monthly review meetings (conducted monthly in lieu of the weekly one-on-one for that particular week) the manager will report the record of feedback for all deliverables created during that month (likely 1-3 deliverables). The overall trends will be discussed with the IDer. IDers will have the opportunity to note points of improvement and areas for further development. The IDer will have the opportunity to ask questions for clarification, make suggestions for improved client interactions, and make suggestions to the new DelveDig processes.

Emotional (Appendix G & H)

Level One: Reaction (Appendix G)

An online survey administered through SurveyMoneky will constitute the level one

reaction. A five-question survey to be taken three-four months after the implementation of

the new support system will constitute the reaction level evaluation step. This will allow

for 3-5 working support sessions to occur and enable IDers ample time for them to develop

a reaction to the process. The survey can be found in Appendix G.

Level Three: Behavior

In-person interview (Appendix H)

In order to ascertain the general mood and mental energy of each IDer, a brief in-person

interview will be conducted at the beginning of each one-on-one support meeting. The

interview will consist of two questions. They will be the same each time. The manager will

collect the ID responses and review them weekly to assess the overall mood. Numeric

coding should be used to determine an overall score of them. The point of the interview is

two-fold; determine the overall mood of team and identify specific members that may

require additional support. A secondary benefit to this structure is that individuals who are

performing particularly well in the new process may be identified as team mentor who

might be capable to support team members struggling with the new process. Questions are

listed below. Scoring for the questions can be found in Appendix H.

Questions:
1. How are things going with the new process?
2. Can you tell me the one thing that needs improving with the new process?

"Frustrated" count (Appendix H)

A "frustrated" menu option will be located on the front page of the DelveDig system. A click

on the "frustrated" menu will take the user to a large graphic button containing "frustrated"

as the text. The only other information presented on the page will be the following support

text; "I feel…" before the button and "by DelveDig's new rapid prototyping ID process" at

the conclusion of the page. This will allows managers to monitor the quantity of times that

an IDer feels frustrated with the new process at the time of that frustration. It will then

allow them to monitor whether feelings of frustration are decreasing, increasing, or staying

the same. If proper support mechanisms are in place, IDers should feel a decreased sense of

frustration. This button provides the added feature of allowing IDers an immediate and

actionable outlet for frustration that experience. Three narrative questions based on the

confidence-building strategies employed in support of the ID will be asked at the

conclusion of the meeting:

1. Do you understand the "criteria for evaluation of performance"? (Keller, 1987, p. 5).
2. Do you feel you have been helped to set "realistic goals"? (p. 5)
3. Do you feel you are being supported "to become increasingly independent in learning and practicing" (p. 5) the new ID process?

<u>Conclusion</u>

The performance interventions described previously serve to increase client satisfaction

through the reductions of training development time and increased transparency

throughout the process. Increased support to DelveDig's instructional designers is also an

important component of the intervention strategy. Change can be challenging and the new

process will be more successful if implemented with confidence-building support to the

instructional designers. Additionally, the instructional designers will have the added

benefit of an improved work life through both an improved process and enhanced personal

support.

References

Chapman, A. (2014). Kirkpatrick's learning and training evaluation theory. Retrieved from
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Keller, J.M. (1987). Development and Use of the ARCS Model of Instructional Design. *Journal
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Molenda, M. & Pershing, J.A. (2004). The Strategic impact model: An Integrative approach
    to performance improvement and instructional systems design. *TechTrends 48(2)*,
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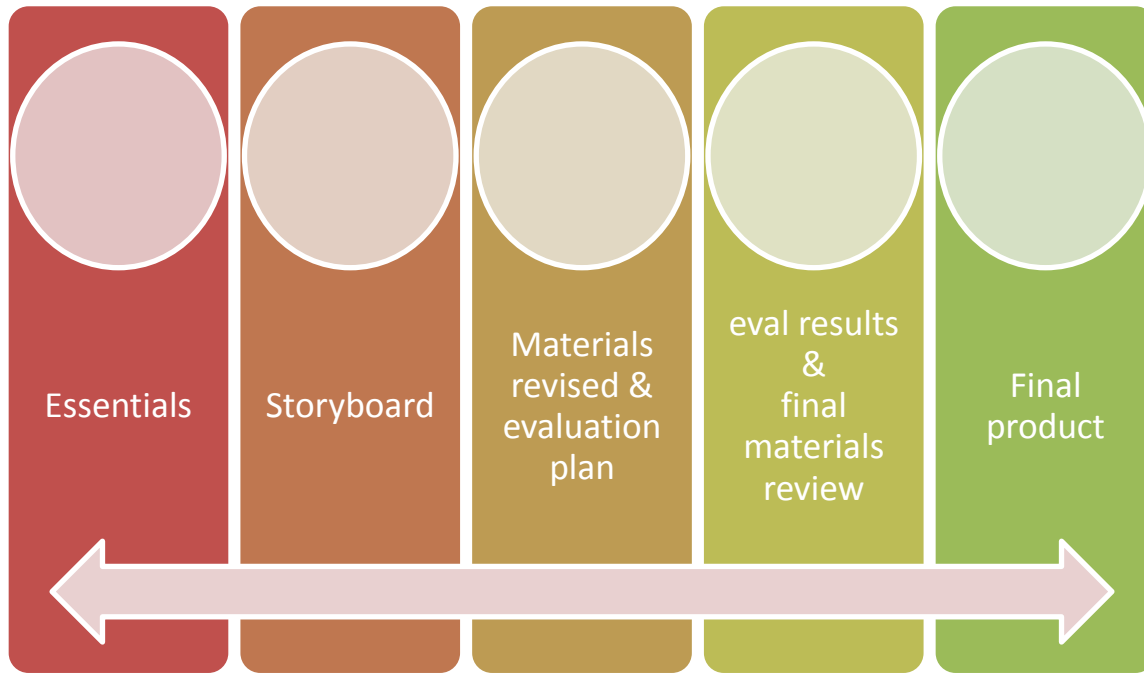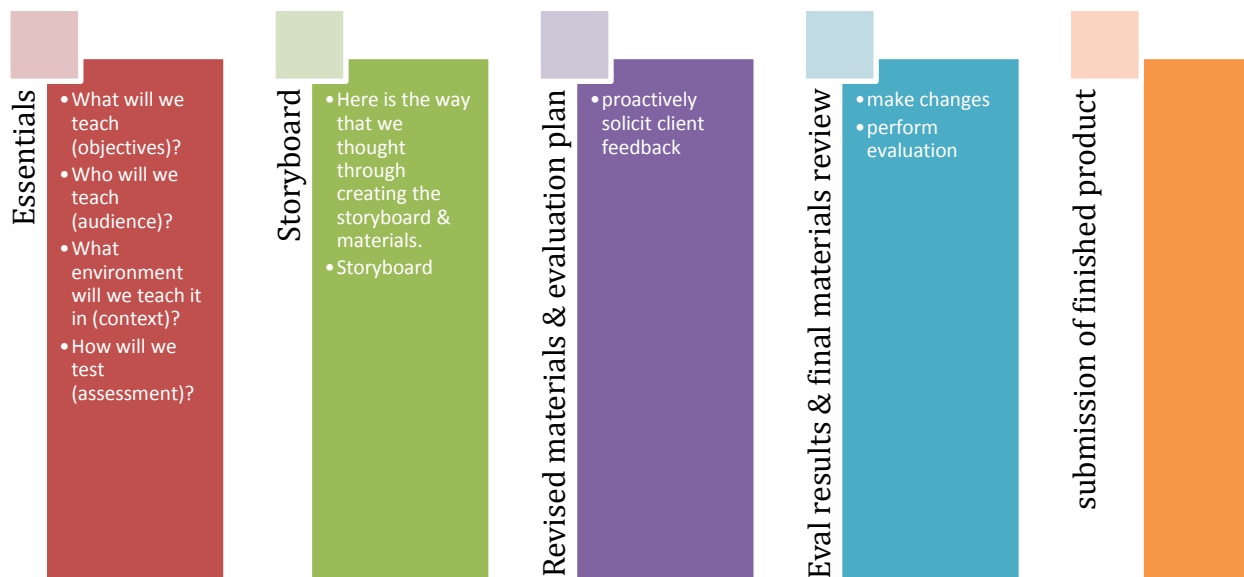   Society for Training and Development Press.

Appendix A

Appendix B

DelveDig Rapid Prototyping Phases – client deliverables

DelveDig Rapid Prototyping Phases – Internal processes

Appendix C – Sample Client reports – Essentials & Storyboard

Essentials

Subject and Context

Employees at every level are looking to increase effectiveness at work. Many people understand their specific job but do not know how to increase effectiveness by getting to know their fellow employees, creating alignment, and get things done in the workplace. Their organizations will benefit by enhanced effectiveness and increased retention. The training will be an instructor guided, online format provided through a proprietary version of the Moodle LMS. Photoshop, Dreamweaver, Camtasia and iSpring Presenter 7 technologies may be used.

Identify Target Learners

The learners are graduate school students ages 25-42 years old who are aspirational learners and have a need for enhanced leadership in their workplace. As Horton (2012) says, "abilities and attitudes matter more than just age, gender, nationality, and economic class" (p. 13). Graduate students in The Advantage Leadership Curriculum could be studying engineering, nursing, business, or nutrition.

Intended Instruction

This online learning module will be instructor guided. The instruction will include information about the Myers-Briggs Type Indicator (MBTI) and how to use this information about yourself and your co-workers to enhance trust which is essential for team building. Team building is an essential element of improving organizational health. This content will be delivered to online graduate programs so the delivery method is a restriction of the design. The learners are

Discuss the Learning Environment/Proposed Delivery Method

The online delivery method will require the use of an LMS. Although the design of the curriculum is for a proprietary customization of Moodle, the instruction could be expanded to

Learning Objectives

Horton's (2012) guidelines are used for the objectives listed below with corresponding prerequisite. Target Learners: Graduate school students enrolled in the Patrick Lencioni's The Advantage Leadership Curriculum.

- Identify 2-3 trust building opportunities given a specific workplace scenario
  - Comprehend that trust is an important aspect of team building
  - Differentiate trust building activities from trust destroying activities
- Recall the specific MBTI characteristics of a given personality type until 100% success rate is achieved
  - Compute personal MBTI
  - Identify different personality types of the MBTI
- Decide specific strategy for approaching a team member given his/her MBTI and a specific workplace goal until 85% success rate is achieved
  - Interpret MBTI for use as a team building tool
  - Recall specific MBTI characteristics given a personality type
  - Identify trust building opportunities given a specific workplace scenario
- Formulate the MBTI of a team member given personality clues in an interactive graphic with improved success after repeated attempts
  - Analyze a room of team members noting specific interactions among the team
  - Recall specific MBTI characteristics given a personality type
- Customize a trust building strategy given an individual team member and an organizational objective
  - Interpret MBTI for use as a team building tool
  - Believe that trust is an essential aspect of team building

References

Horton, W. (2012). E-learning by design (2nd ed.). San Francisco, CA: John Wiley and Sons, Inc.

Storyboard

Screen # 1 — Title: Welcome to ALC

Advantage Leadership Curriculum

Based on Patrick Lencioni's New York Time's Best Selling novels... *Five Dysfunctions of a Team* and *The Advantage*

Screen # 2 — Title: Five Dysfunctions

- Five dysfunctions text

Focusing on... Results
Embracing... Accountability
Achieving... Commitment
Mastering... Conflict
Building... Trust

The Five Dysfunctions of a Team model © Patrick Lencioni

Begin trust building experience

Screen # 3

Screen # 3 — Title: Objectives Overview

- Why Building Trust is important in workplace (4)
- Characteristics (5)
- Understanding different MBTI (6)
- Determining MBTI (7)
- Strategies on how to use MBTI to Build Trust (8)

MBTI

Screen 4

Next

Screen # 4 — Title: Why Building Trust is important

- Why building trust is important text

Learning to identify trust building opportunities — Screen 4.1
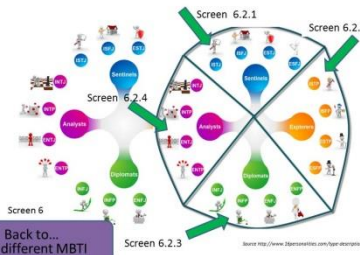
Try it — Screen 4.2

Screen 5

Next

Screen # 4.1 — Title: How to Build Trust

Screen 4.0

Back to... Build trust

How to build trust text

Try it — Screen 4.2

Screen # 6.2 — Title: MBTI

Screen 6.2.1

Screen 6.2.2

Sentinels

Analysts

Explorers

Diplomats

Screen 6.2.4

Screen 6

Back to... different MBTI

Screen 6.2.3

Source: http://www.16personalities.com/type-descriptions

Screen # 6.2.2 — Explorers

Back to... MBTI — Screen 6.2.1

Type	Description
ISTP	**Strengths:** Logical and spontaneous, controls energy, not sensitive about person space, explorers, engineers, combo of creativity and practicality. **Weaknesses:** Not predictable reactions, might have difficulty recognizing boundaries, may unwittingly hurt individuals belonging to more sensitive group
ISFP	**Strengths:** Quiet, serious, enjoys present moment, creative, well developed senses, strong appreciation for beauty. **Weaknesses:** Sensitive, does not like conflict, not likely do things that will cause conflict, not interested in leading
ESTP	**Strengths:** Social, spontaneous, direct, focused on the present moment, adaptable. **Weaknesses:** Rude, reckless, dislike theoretical debates, immediate results
ESFP	**Strengths:** People-oriented, fun-loving, living for the moment, love new experiences, common sense and practical ability, insatiable curiosity. **Weaknesses:** Dislike theory, impersonal analysis is a bore, likely to be the center of attention

Screen # 6.2.3 — Diplomats

Back to... MBTI — Screen 6.2

Type	Description
INFJ	**Strengths:** Quietly forceful, original, sensitive, stick to things until they are done, intuitive about people, individualistic (not leading, not following), combination of idealism and decisiveness. **Weaknesses:** Zeal and determination can get out of hand, need alone time
INFP	**Strengths:** Quiet, reflective, idealistic, interested in serving humanity, extremely loyal, talented writers, calm, affectionate, direct energy toward select activities. **Weaknesses:** Shy, seek harmony so negative events can dishearten them easily
ENFJ	**Strengths:** Popular, outstanding social skills, externally focused. **Weaknesses:** Concerned about how others think and feel, dislikes being alone, sees everything from the human angle
ENFP	**Strengths:** Curious, idealistic, life is complex puzzle of connected parts, popular, influential, enthusiastic, appreciate spontaneity. **Weaknesses:** Worry about not being original, may have lower self-esteem, do not welcome attention, sensitive, dislike routine

Screen # 6.2.4 — Title: Analysts

Analysts

Type	Description
INTJ	**Strengths:** Highly intelligent, perplexingly mysterious, self-confident, relies on huge archive of knowledge spanning many topics, independent, curious. **Weaknesses:** Does not enjoy spotlight, perfectionist, cynics, difficult to handle romantic relationships
INTP	**Strengths:** Love theories, everything can be analyzed and improved, good at noticing patterns, unbiased philosophers, architects. **Weaknesses:** Not practical
ENTJ	**Strengths:** Pioneer, mobilizer, critical thinkers, knowledge oriented, ambitious, planner, cool headed, organized. **Weaknesses:** arrogant, opinionated, may set unrealistic goals, fast decision making, critical about inefficiency, don't compliment easily
ENTP	**Strengths:** Creative, resourceful, intellectually quick, enjoys debate, loves new ideas. **Weakness:** May want to "one-up", may neglect routine aspects of life

Screen 6.2

Back to... MBTI

Appendix D

Instructional Design Feedback session through one-on-one meeting	
Evaluation of new process *Questions asked to ID*	1. How are things going with the new process?
	2. Can you tell me the one thing that needs improving with the new process?
ID Feedback *Information provided to ID*	1. Frustration level tally (overall team).
	2. Client complaint documentation: How many clients have occurred in the last week? What is the client complaint trend (complaints/week in the last month)?
	3. What did the IDer do to rectify the complaint?
	4. Were proper procedures followed when the complaint was received?
	5. Re client complaints: What was done well, what could be improved for next time?
	6. A review of the latest client deliverable including client's reaction to the deliverable.
	7. Re client deliverable: What was done well, what could be improved for next time?
	8. Discussion of successful areas (potential identification of mentoring opportunities based on successful execution of one or more parts of the process.
ID support *Questions asked to ID*	1. How many times did you press the "frustrated" button? How would rate your level of frustration or pleasure with the new process?
	2. What do you need from me (manager) to be successful?
	3. How could you feel more supported in serving our client's needs?
Evaluation of ID Support System *Questions asked to ID*	1. Do you understand the "criteria for evaluation of performance"? (Keller, 1987, p. 5).
	2. Do you feel you have been helped to set "realistic goals"? (p. 5)
	3. Do you feel you are being supported "to become increasingly independent in learning and practicing" (p. 5) the new ID process?

Appendix E

Views of Happy Clients Decision Tree Prezi

Appendix F: Reports – page 1 of 2

Deliverable Feedback & Response Report

[Company Name]
[Project Name]
[Instructional Designer]

Deliverable feedback	Deliverables				
	Essentials	**Storyboard**	**Revised & Eval plan**	**Final materials**	**Final Product**
Score (out of 10)	7	8	9		
Increase/decrease from previous project	2	(1)	0		
Actions taken based on formative feedback score (out of 10)	9	9	9		
Client Complaints	2	3	1		
Increase/decrease from previous project	(2)	0	1		
Narrative Section of Feedback					
Positive feedback from the client	Cllient was satisfied that the essentials document provided the appropriate information in an easy to understand format.	Client was excited by the story board. Creative, easy to work with, and helpful were used to describe the deliverable.	Client said updates were on target. Evaluation plan was useful and on target.		
Client complaints	Essentials meeting was re-scheduled and client was anxious to see deliverable. Frustration was expressed regarding information requests.	Request for information was met with resistance. Questions regarding the validity of the storyboard were raised. Failure to provide details.	Client was displeased with the state of the revision. More detail was expected.		
Improvement suggestions from the client	Request all information at the beginning of the process.	Request all information at the beginning of the process.	Provide greater details.		
How the ID responded to the client complaints	Understanding and concern was expressed regarding the significant amount of information needed.	Changes to the request for information procedures were made internally. This update of procedures was communicated to the client.	Assurance of more details was made. Details were added and communicated to the client.		
Highlights of most successful areas by the ID	Calm explanations and client management was highly successful.	The initial Storyboard was excellent and will be used as a company benchmark.	Client communication is a major area of improvement.		
How the ID made changes based on client feedback	Information requests were confirmed as necessary.	Internal processes were changed.	Details were added.		
How the ID made changes based on manager feedback	Client communication was increased.	Requests for information processes were changed internally.	Proactive stance with client communication.		
Areas to work on going forward	Improvements to essentials deliverable.	Proactive stance towards client happiness.	Continue to work on client communication.		

Client Compliant Log

[Company Name]
[Project Name]
[Project Timeline in Months]

Gray cells are calcuated for you. You do not need to enter anything in them.

Client Complaint Log	Complaint #1	Complaint #2	Complaint #3
Client complaint type			
Complaint rating	9.5	10.00	8.00
ID rating of client support	100.0	50.00	80.00
Percentage score of properly managed complaint	95.0%	50.0%	64.0%
Time of complaint			
Date	8/8/2013	8/25/2013	9/10/2013
Week of project	week 1	week 3	week 5
Deliverable stage of project	essentials	storyboard	eval plan
Time of day	2:00pm	3:00pm	9:00am
	-		

Appendix F: Reports – page 2 of 2

Client Complain Trend Report and Graph

[Company Name]
[Project Name]
[Project Timeline in Months]

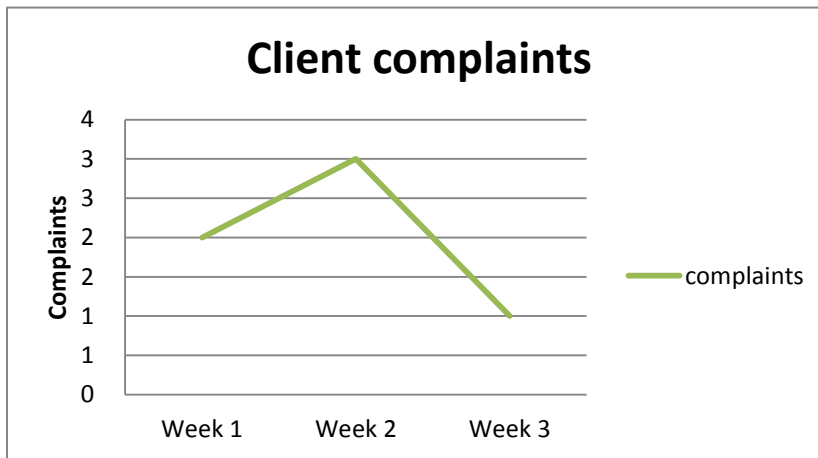Gray cells are calcuated for you. You do not need to enter anything in them.

Client complaint trend	Week 1		Week 2		Week 3	
Total complaints	2		3		1	
Increase/decrease from previous week		0		+2		(2)
Properly managed complaints	2		2		1	
Percentage of properly managed complaints	100%		67%		100%	
Increase/decrease from previous week		0%		-33%		133%

Appendix G

Survey monkey screen shot & link

https://www.surveymonkey.com/s/PZNZLTB

1. How supportive do you feel your supervisor is of your goals?
- ○ Extremely supportive
- ○ Quite supportive
- ○ Moderately supportive
- ○ Slightly supportive
- ○ Not at all supportive

2. Feedback that I receive is meaningful and actionable.
- ○ Strongly Agree
- ○ Agree
- ○ Neutral
- ○ Disagree
- ○ Strongly Disagree

3. I feel capable to perform the rapid prototyping process.
- ○ Strongly agree
- ○ Agree
- ○ Neutral
- ○ Disagree
- ○ Strongly disagree

4. I feel supported in the rapid prototyping process.
- ○ Strongly agree
- ○ Agree
- ○ Neutral
- ○ Disagree
- ○ Strongly disagree

5. Overall I am happy with my job.
- ○ Strongly agree
- ○ Agree
- ○ Neutral
- ○ Disagree
- ○ Strongly disagree

Appendix H

In-person interview scoring rubric

	1 point	2 points	3 points	4 points	5 points
Question #1	any response	for a negative comment said with a calm tone	for a neutral comment	somewhat or mostly positive comment	positive comment
Questions #2	no suggestion due to anger	a complaint session or overabundance of suggestions	suggestion that is delivered with in neutral tone	comment about a minor suggestion in a mildly positive tone	comments that is everything working well or delivered with genuine interest to improve the process

Frustrated screen shot and link

http://web.ics.purdue.edu/~etwomey/frustratedButtonPage.htm