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What Graduate School Didn't Teach You About Instructional Design Consulting

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Introduction

Instructional design consultants provide learning and performance solutions for their clients. However, it can be difficult for instructional design students and newly graduated instructional designers (and even some experienced instructional designers!) to adapt to the realities of consulting in a real-world context. This difficulty is magnified by significant technological, social, and other disruptions that often occur in work and learning environments. In our observation, newly graduated instructional design consultants enter the workforce equipped with powerful tools, theories, and models for increasing learning but are less equipped to consult with their clients and other stakeholders. Based on this observation, we see an opportunity to share key practice-based, expert-informed skills, principles, and strategies for success as an instructional design consultant.

This article is based on our experiences as instructional design consultants. And while we approach this article based on our experience as external instructional design consultants hired from outside the organization, these insights may readily apply to internal instructional design consultants employed by the organization. We first describe foundational skills and principles for achieving positive consulting outcomes. We then share constraints and obstacles an instructional design consultant often faces, as well as strategies that can be used to overcome these obstacles. We emphasize ways to maintain fidelity to principles amidst the continuous technological and social disruptions that require workplace learning and performance improvement. We then outline key strategies for ensuring that learning and performance solutions have long-term resilience and impact. Finally, we conclude this article with reflections on the education and practice of instructional design consulting.

Definitions

Instructional designers participate in "…the creation of learning experiences and materials in a manner that results in the acquisition and application of knowledge and skills" (Association for Talent Development, n.d.). A *consultant* is "…a person in a position to have some influence over an individual, a group, or an organization but has no power to make changes or implement programs" (Block, 2011, p.2). While this article emphasizes consulting, a combination of both design and consulting skill sets makes an instructional design consultant effective.

In this article, we define the *client contact* as the individual that the consultant works directly with and who responsible for the outcomes the consulting engagement. We define the *client or project sponsor* as the senior leader who is financing the consulting engagement and is responsible for organizational outcomes (Robinson et. al., 2015). In some cases, the client contact and the client or project sponsor may be the same person.

Key Consulting Skills and Principles

There are key principles and skills for successfully working with your clients as an instructional design consultant, regardless of the context in which you are working. We describe these below. Note that the first four principles we highlight are reflected and have roots in ISPI's Certified Performance Technologist (CPT) Standards (International Society for Performance Improvement, n.d.).

Principles

Principle 1: Focus on Results (CPT Standard 1)

What specific measurable results is the client seeking, and how can you use your expertise to help them achieve those results (International Society for Performance Improvement, n.d.)? Establish measurement criteria with the client at the outset. What does success look like? Focus on the client's needs and how you can help them. Focus on the client's needs and how you can help them.

Principle 2: Take a Systemic View (CPT Standard 2)

Look at the multiple processes, systems, and ecosystems that impact the client's problem or need. Identify the specific causes of performance issues. This systemic view allows you to clarify and potentially address the critical dynamics contributing to the need and avoid creating issues. Many performance problems in organizations are complex, unstructured problems. A systemic view helps you and the client team establish priorities for the solution set and identify barriers to successful transfer of learning to application. (International Society for Performance Improvement, n.d.).

Principle 3: Add Value (CPT Standard 3)

Be the outside, objective voice. Use your expertise to facilitate improvement and apply creative solutions. Your role may allow you to make added contributions to the project and solve process problems along the way. For example, we have added value through facilitating a decision-making meeting, identifying barriers to communication, identifying omissions to processes that put project success at risk, and many other contributions beyond our identified role (International Society for Performance Improvement, n.d.).

Principle 4: Collaborate (correlates to CPT Standard 4)

Partner with the client to achieve the client's goals. This means taking on a "we" and not a "me" mentality. Understand and clarify the client's needs and establish a productive working relationship for achieving those needs.

Principle 5: Be Professional

Maintain a positive attitude and demeanor, despite any obstacles that may present themselves. In any consulting relationship or project, things will go wrong. Also, remember that your main client contact is most likely overworked and has many stress points, so providing a positive, professional outlook even when a project runs into obstacles goes a long way toward helping your client contact feel good about the project. When dealing with difficult personalities, concentrate on process, procedures, and design methods to maintain a professional focus.

Principle 6: Be Flexible

Things change quickly and regularly, so diplomatically adjust based on the client's needs. Even when others do not provide you with the resources you need to move forward, stay positive and flexible. That doesn't mean let the project scope get out of hand, but if you can demonstrate some flexibility with your clients they are likely to respond positively when you express concerns about project scope creep or other issues that might arise.

Principle 7: Be Humble

Apply and maximize your expertise to the benefit of the client. At the same time, don't expect that you have all of the knowledge needed to solve the problem. Be appropriately inclusive and have the right people at the table for making decisions at various points in the project. Actively listen to, empathize with, and work to understand your client and their needs.

Skills

Skill 1: Learn the Client's Business

Learn and understand your client's business. What are their strategic goals? What performances are most critical for the organization and for the end users you support? What big changes or projects will the organization be taking on in the near future? Knowing your client's business will enable you to build relationships of trust and add greater value throughout the consulting engagement.

Skill 2: Communicate Effectively

Seek to understand your client and the various stakeholders you work with. Do the work necessary to understand their perspective, needs, and goals. Listen actively and reflectively to build clarity and confirm that you understand their perspective and needs.

In addition to listening, prepare thoroughly for meetings and craft clear, quality communication to your client. Develop presentations that effectively communicate and that address the needs of the client and stakeholders.

Effective reporting of project progress is an important communication skill. Ask the client when and how they would like the project progress to be reported, and then report regularly to the client on your project's progress and any potential issues you foresee.

Skill 3: Manage Stakeholders

In instructional design consulting, stakeholder management goes beyond simply working effectively with subject matter experts (SMEs). For any project there are many different stakeholders (individuals or groups), including the learners, their managers and customers, other professionals who work upstream or downstream, and other organizations who are impacted by the business results of the learners. Some of these stakeholders should inform the solution, and others may be great interview respondents during the analysis. Employ the following strategies to work with a project's stakeholders:

- *Work effectively with the project sponsor* – A critical person to build positive relationship with is the project sponsor, who is typically the senior executive in control of the budget for the project. Because they control resources for the project, you must collaborate effectively with them. At times this might mean taking on tasks other than what they initially hired you to do, but be sure to add value and provide the project sponsor with the results or outcomes they seek. Work with them to identify with all project stakeholders.
- *Build positive relationships* – To build positive relationships with project stakeholders, you must be tactful, build trust, demonstrate confidence, and tailor your communication to the stakeholders' specific needs. This helps build a positive relationship with the client.
- *Gain buy-in from all stakeholders* – Another key strategy is getting all stakeholders on board with the most effective solution to the problem you are hired to solve. This requires effective relationship building and communication, as well as supporting your client contact in their own management of stakeholders.
- *Project reviews* – Hold regular project reviews where all stakeholders are represented. This provides a clear message to all and ensures the project status is being communicated.

Skill 4: Manage the Project

Effective project management skills can be the deciding factor in the successful completion of a project. These skills include the following.

- *Clarify expectations* – Clear roles and expectations make projects more effective. Clarify who creates and manages the project schedule and milestones.
- *Plan the project* – If no one else is doing it, create and communicate a project plan with roles, activities, timelines, and dependencies.
- *Keep stakeholders on schedule* – This includes persuading stakeholders to take action or provide needed inputs on time.
- *Monitor scope creep* – Your role is to monitor any added requirements beyond the agreed upon scope. Alert the client immediately when scope is changing and explain the possible ramifications.
- *Monitor scope crush* – Ensure that necessary, impactful project components are not taken out of the project plan. Be sure to communicate to the project sponsor that this change could result in negative project impact.
- *Meet deadlines* – Deliver your artifacts on time and within the budget, even if it means long hours. Meeting deadlines also helps to establish your credibility and maintain positive relationships with the client.

Skill 5: Manage Change

In concert with the skills of project management, consultants must be skilled in helping their client and stakeholder teams plan for and adapt to change. Help your clients figure out what they need to do to support the change for all stakeholders. Understand what is changing and who is impacted. Identify what is planned to help stakeholders and end users make and sustain these changes. A formal change management plan may be needed, which typically includes identifying a communication strategy for impacted audiences and determining how the organization will support the change and sustain the new performances. When you understand existing plans, you can provide additional insights on effective change management.

One important thing to clarify with your client is what the end users will need to *unlearn*. They may have been doing their work a specific way for a long time, so clarify what they need to stop doing, how this can impact the time required in training, and what supports and reinforcements the users will need. In many cases, clients fail to communicate the change and why it is needed, so you can help the client "market" and "socialize" the anticipated change.

Solutions to Common Consultant Obstacles

Instructional design consultants often face obstacles to helping clients achieve their goals. In this section, we present a set of the common obstacles that we experience, along with key strategies for overcoming those obstacles. You will likely note connections between the principles above and the strategies we describe below.

Obstacle 1: The Client Is Requesting or Demanding a Solution That Doesn't Effectively Address the Needs

In some situations, consultants may feel pressure to respond to a consulting request. Below are situations or phrases that indicate that you are being asked to be an order taker.

- *Design Demands* – The client is driving the design to the point of being ineffective. Key phrases might include "I want gaming," or "We need to go with a simulation for this module."

- *Skipping Steps* – The client isn't allowing you to apply critical steps of your chosen design model. Key phrases might include, "I already know all that – let's get at it," or "we don't need to conduct an analysis or evaluation," or "I don't have time to do it that way."
- *Content Crunch* – The client wants a 15-minute learning experience has but 45 minutes of content. Key phrase might be, "We just need to cover the content."

We recommend the following potential strategies for overcoming these kinds of requests or demands. We write at length on this issue because it can be the cause of considerable problems for instructional design consultants and their clients.

Know your boundaries and the goals of your practice – Be clear with yourself about whether a given relationship or project is a suitable fit for who you are and the kind of work you do. Is your role to be an order taker and simply do what the client asks, or will you take on a more consultative role in which you add value through persuasion and expertise?

Consider exiting – Before agreeing to take on a project, determine whether your participation is appropriate for your business. If you feel the project will not be a success, consider declining to take on the project. This can be a difficult decision, but it can preserve or even build your credibility as a consultant.

Establish your expertise – If you have already engaged in a project, you must establish yourself as an expert. This means confidently showing and sharing your expertise to the client. This requires knowing your business, so you must continually engage in building your expertise. Establish expertise by explaining design principles and learning methods that are backed by science and experience, not simply an opinion.

Focus on needs and results – Redirect the client's focus to the problem or opportunity the organization is poised to address. Focus on their desired results, including measures of success, and work backwards into the project. Discuss issues and opportunities with the client, leveraging your knowledge of how and under what conditions instructional design strategies and associated learning methodologies impact measurable outcomes.

Project requirements – Another alternative is to create a list of project requirements. These may be broader than Key Performance Indicators or measurable outcomes but serve as a way to frame the conversation. Remember that technology should not drive design, but rather design should drive the use of technology.

Learn why – It's tempting to try to educate the client, but they may not have time for this level of discussion. Instead, take the time to learn why the client is attracted to a certain solution. Ask questions. The answer may provide an easy way to reconcile the challenge.

Intervene with the client – In some cases, you may need to take more extreme measures to help the client achieve success. If you are in this situation, consider the following steps:

- Do not confront a client in a group setting. Confirm their desired results and your shared commitment to achieving them.
- Ask questions to identify perceived barriers to adopting your recommendations.
- Share data that supports your recommendation and discuss the risks and your concerns with the alternate approach.
- Be authentic; share your insights from the heart.
- Work to find an alternative way to address needs that you can be confident in and identify other stakeholders that can support your recommendation.

You may need to repeat this process with other stakeholders as appropriate. In some cases, you may want to "document" suggested approaches so that when issues arise, you can review how the team's previous steps which led to the situation.

Obstacle 2: The Client Prefers Skipping Data Gathering

Foregoing analysis or confirmation of need is problematic because it deprives impacted learners and other impacted stakeholders an opportunity for input. If your client is reluctant to gather analysis information, follow this process: First, determine why analysis is considered unwarranted. In our experience, it can be perceived as a barrier to smooth and timely completion of the project when the client organization is committed to an accelerated project timeline or knows that there are differences in stakeholder opinions and doesn't want to get bogged down in exploring these. Once you have a sense for client concerns, craft an analysis methodology that addresses them and still yields the information you needed to design the solution(s). When you present the approach to your client, demonstrate how the data will be used to create an effective solution set. Document your concerns and ensure key stakeholders are aware of your opinions.

Obstacle 3: The Client has an Unrealistic Timeline

Walk through the timeline – Help the client see the reality of the project timeline by breaking it into phases which include their own time requirements. Walk through the phases and propose more realistic timelines, explaining why those hours/days are needed. Always include SME communication and review time in your timeline. Make sure someone on the client side is managing the SME timeline.

Identify ways to accelerate – After walking through the timeline, work with the client to identify activities that can be accelerated. By working collaboratively with the client, you win their support, even if they don't get the timeline they first requested. Common adjustments to accelerate project activities include group meetings (rather than numerous reviews) to resolve issues and tight controls over the number of revisions and the duration of revision cycles. Rather than sending out a design document to numerous reviewers and then trying to aggregate all the various suggestions and views, do a "live" review of the design to allow multiple SMEs to weigh in and come to an active resolution. This shortens the review cycle and allows the designer to explain some of the logic behind certain design approaches.

Obstacle 4: The Project Is Growing Beyond the Initially Agreed Upon Scope

At times, clients may request additional content, require extra review cycles, or add other elements that require more time and effort. Address these issues proactively in the kickoff meeting. Ensure the client understands that some additional requests can affect the budget and/or the timeline. Create a robust project plan with project activities and timelines to keep everyone on the same page. If additions are requested during the project, clearly describe how these additions impact the scope of the project and impact the costs and timeline. Explain the implications of the changes and help client decide how to move forward. Also, it is critical to catch this early in the process and remind the client of what was discussed in the kickoff meeting. Avoid confronting or arguing with the client.

Obstacle 5: The Client Is Interested in Designing Something Complex or Sophisticated but Doesn't Have the Capability to Deliver or Maintain This Solution

If a project is not feasible, walk through a high-level project plan with the client so they understand what activities will need to be undertaken, by whom, and with what skill set. This helps them to understand potential resource gaps. If possible, help the client secure the needed resources for delivering and maintaining the solution. Share in clients' disappointment when the vision doesn't match the resource reality. Help the client craft a new vision that aligns with their organizational capabilities. True instructional designers should be able to offer alternative solutions and explain the pros and cons of each.

Obstacle 6: The Client has Made Unrealistic Promises to Their Stakeholders About the Solution and What it Can Accomplish

Sometimes clients overpromise to their stakeholders, which can create unrealistic expectations and put the client in an uncomfortable position. Work with the client to make sure they are clear on the solution and what it can accomplish. Help craft a communication plan to inform and change stakeholder expectations. Support your client in the execution of this plan, including individual meetings, group meetings, presentation materials, graphics, language, and product demonstrations. A client who continues to overpromise may put both your reputations in jeopardy, so it's worth the time and effort to help make any necessary corrections. Again, these types of issues must be addressed in the kickoff meeting.

Obstacle 7: Difficulty Working with Subject Matter Experts

Gaining SME access and participation – Subject Matter Experts can be very busy, and it can be difficult to get access to and participation from them. To prevent this issue, determine up front what SME participation will be needed and secure the sponsor's commitment to providing it. Be explicit about the extent to which the success of the project relies on SME input. Discuss the need to get SME leadership support, including releasing SMEs from other commitments. Find ways to hold SMEs and their leadership accountable for their participation, the quality of their participation, and their adherence to timelines of the project. Hold "live" review sessions to speed up the process. Reach out to SMEs individually by email or other communication for needed items when they are lagging. This lets them know that you aren't calling them out, and they have an opportunity to deliver before the next meeting with other SMEs.

Build relationships – Create positive relationships with SMEs and give them credit for their contributions. Remember that they have other job requirements that are likely more visible and more related to their success at their organization. Make participation easy for them by working around their schedule, offering different ways they can provide content (e.g., in an interview or via recorded video), leveraging existing materials, and giving credence to their ideas and suggestions. Acknowledge the SMEs and the importance of their role.

Complex Content – There can be times when an SME provides content that is too technical for the scope of the project or for the end user of the course. Communicate and collaborate with the client to determine the appropriate level of expertise to be delivered to users. Work to understand the content so you can make solid decisions when breaking down the content into an appropriately consumable course.

Fidelity to Principles Amidst Disruptions

It can be difficult to remain consistent to foundational principles while adapting to technological advancements and social disruptions that impact workplace learning and performance. Below are key strategies for maintaining fidelity to foundational principles of instructional design and consulting while adapting to an environment of change.

Fidelity Strategy 1: Build Fidelity to Key Principles

Continually deepen your expertise in foundational learning, instructional, and performance principles. Consider adopting the consulting principles identified in this article.

Principles ensure effectiveness despite the changing context and constant disruption in contemporary workplaces. Remember, clients often look for a “wow” factor and think technology is the answer; however, technology should not drive the design, but rather the design should drive how technology is utilized.

Fidelity Strategy 2: Develop Yourself and Your Team

Set aside time for your own upskilling and reskilling. Make sure your team is continuously learning and growing. Lead your team in conversations/solutions about responding to changes. Network, attend conferences, monitor professional literature and industry standards, and participate in groups who embrace sound practices. Study industry changes and their implications to your practice.

Fidelity Strategy 3: Experiment and Question

Try new things on a small scale to learn and validate new approaches. This can also be another great way to convince a client to try “your” way—suggest a small pilot to confirm an approach that all can be confident in! Assess your ignorance and prepare to make changes as you progress. Ask questions and confirm assumptions. The landscape as you know it may have changed!

Fidelity Strategy 4: Connect and Partner

Stay connected with your peer groups. Engage in conversations about new technologies. Read blogs then have coffee or a Zoom chat with a peer to discuss exciting new developments and the pros and cons. Learn from others’ experiences! What are your peers saying about this exciting new technology? Also, partner with others who have different expertise and different perspectives to enrich your solutions and recommendations. Whatever you learn, always roll back to foundational principles.

Fidelity Strategy 5: Unlearn

Unlearn and quit doing things that no longer serve a purpose. Let go of the technologies, processes, theories, and models that no longer serve you or your clients effectively. Often this can mean letting go of overly-prescriptive approaches while staying faithful to the underlying principles of those approaches.

Ensuring Solutions' Long-term Resilience

Continuous change, disruption, competition, and innovation require solutions that are resilient and support the organization long-term. The following strategies can be employed to ensure quality, long-term solutions for your clients.

Resilience Strategy 1: Organizational Capacity and Fit

Consider the capacity of the organization you are working with. Design a solution that is within their capabilities or help them staff to support new capabilities. In addition to skill capacity, consider technical capacity and make sure that the client can update or manage the updates to whatever you create. Also, consider solutions that fit the client's needs. Learn and understand the client's goals and their current capabilities. Project your client organization's next steps in learning development and consider this when developing solutions to better accommodate anticipated future needs.

Resilience Strategy 2: Usability

The solution must be easy to use and fit within the performance environment and company culture. Designing elearning, for example, that is easily navigated and is tailored to the end user's needs and preferences is more likely to be used. As another example, just-in-time learning or learning at the point of application can make the solution more likely to be used in an ongoing manner.

Resilience Strategy 3: Performance Mindset

Consider all the elements that have impacted past performance, and that may impact future performance. Your instruction's design must address the specific needs and context of the organization. Include strategies that are different from instruction but may support performance, including performance support tools, organizational strategies, and incentives.

Resilience Strategy 4: Scalability

A program that is easily scalable has more resilience. For example, a program that requires a facilitator to travel to various locations is limited by time, cost, and instructor availability and thus is less scalable. For example, self-paced and self-directed assets are more scalable than an instructor-led, in-person training.

Resilience Strategy 5: Maintenance and Sustainability

Design your solution so that it is easily maintained, and plan for the maintenance needed to keep the solution current. For example, modular designs can allow for easier updates. When designing, consider how easy it is to update course components (e.g., audio, video). Create documentation that ties the instruction to the underlying documentation or business process so that if these do change, the team has a record for what in the course will be impacted. Provide visual design that is not too trendy and will not appear dated in a short period of time.

Help your client plan for ongoing maintenance and sustainability of the solution as part of the project planning and documentation. Ask the following questions. How fast will the content age? What will happen when business processes change? When will this project need to be revisited? How will feedback be gathered on an ongoing basis to ensure that the solution meets user needs? Identifying and creating these expectations upfront will help clients budget and plan for updates.

Resilience Strategy 6: Build Supporting Systems

Don't forget that the organization may need a system to support the solution. Clients may ignore the knowledge management aspects that underlie a performance change. For example, if you present a course that includes job aids, how will new hires be brought up to speed? How will people access job aids outside of the course? Does everyone know where to find what they need to review? Are managers trained in giving feedback on new performances? Have you built new performances into accountability systems? Answering these kinds of questions help ensure long-term resilience of your learning solutions.

Conclusion

Instructional designers have expertise that can positively impact the organizations and teams they serve. However, a combination of instructional design and consulting skill sets makes an instructional design consultant effective. As a learning professional, you must be at the forefront of continuous learning and development. We urge new graduates of instructional design programs to continue their education by enhancing their expertise in these areas. As you progress through your career lifecycle, you will benefit from assessing the skills you have and target skills to develop and improve. Be purposeful and intentional about including consulting skills in that assessment. This skill of self-awareness and continuous improvement is the foundation of your contribution to the project. Assess what you know—and what you do not know—to provide value. Employ available resources to create a development plan to learn, practice, and grow those skill sets so that you can continue to succeed and have impact in your chosen profession.

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