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Competencies of expert web-based instruction designers

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COMPETENCIES OF EXPERT WEB-BASED INSTRUCTION DESIGNERS

by

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Advisor Date

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DEDICATION

To my husband Hantao Wang

For your love and support

That nourished my body and soul

In those long draining hours

I made it because of you

To my children Zixiao and Ming

For your willing hands and ready hearts

So understanding and accepting

I cherish your growth with me

To my parents Zhongming and Xianjin

Who gave me inspiration and spirits

To fulfill this dream of mine and yours

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TABLE OF CONTENTS

LIST OF TABLES

LIST OF FIGURES

CHAPTER 1 INTRODUCTION

Statement of the Problem

Web-based instruction (WBI) is becoming increasingly popular. With the emergence of Internet in the late 1980's, as well as major developments in personal computer technology, it was estimated that two million students were taking post-secondary courses that were fully delivered online (Picciano, 2002). Clark (2008) reported that a near one-third training by 2006 was delivered via Internet, intranets, and CD-ROM, which was about three-time increase compared with 2001. The online courses offered by Global University, based in Missouri, reached 600,000 students in 145 countries (Roger et al., 2007). The growth was described as "explosive in almost all sectors" (Moller et al., 2008, p. 70). However, a significant proportion of WBI products is not encouraging (Oliver, 2006). As Piskurich, Beckschi & Hall (2002) commented, too many technology-based courses, including interactive multimedia WBI courses, "are mediocre at best" (p. 1). Moller et al. (2008) asserted that "mediocrity becomes the norm" (p. 71) and has been hurting everyone. One of the faults could lie in the instructional designers. They may sacrifice long-term learning outcomes in order to meet stakeholders' short-term needs. Or they may lack the required competencies related to the teaching and learning process (Williams, 2002). Because technology entails major changes in the way education is designed and delivered, lack of training in this field is one of the frustrations in this new teaching and learning environment (Simon, 2003; ASTD, 2010). The ASTD/i4cp Instructional Systems Design Survey (2010) revealed that top barrier to effective ISD was the shortage of professionals who "have the

competencies and skills required to meet the needs of a learning initiative" (p. 24). "New competencies are needed for survival in the information age" (Simon, 2003, p, 11).

In response to these needs, this study attempted to identify the competencies for expert instructional designers who specialize in WBI. It was one of the hopes of this study to identify the relative importance of each competency in the competency set of expert instructional designers in order to produce a top quality Web-based instructional product.

Defining Web-Based Instruction

The term Web-based instruction (WBI) has been used to refer to any kind of instruction or training that is delivered via a network (Williams, 2002). More specifically, Carliner (1999) described WBI as a form of instruction or a course available on an intranet, or Internet that is linked to learning resources outside the course, such as electronic references, electronic mail, electronic discussion, and video conferencing. Khan (1997) defined WBI as "a hypermedia based instructional programme which utilizes the attributes and resources of the World Wide Web to create a meaningful learning environment where learning is fostered and supported" (p. 6). A WBI course or program provides flexible environment for instructors and learners through the delivery of non-linear learning, and offers freedom of controlling learning pace (Clewley et al., 2011). In short, WBI carries the power of the Web (Driscoll, 1998) and the interactive advantage of the computers (Schlosser & Simonson, 2002). Learning may take place asynchronously and/or synchronously with instruction (Dempsey & Van Eck, 2002). In

recent years, eLearning has become a popular term; it is sometimes used interchangeably with WBI (Comstock, 2010).

Factors Impacting Current WBI

Despite the advantages and attention, WBI has experienced problems and challenges. At the inception of WBI, administrators and policymakers were once cautiously approaching the adoption of such technology-mediated instruction (Phipps & Merisotis, 1999). This skepticism and reluctance could be due to the high dropout rate. In higher education settings, WBI had a significantly higher incompletion rate (32%) than the on-campus students (4%) (Phipps, Wellman & Merisotis, 1998). Other criticisms came from the lack of attention and support for learners (Driscoll, 1998), usability issues (Henke, 2001), and information overload in asynchronous learning (Picciano, 2002). With organizations embracing WBI enthusiastically, the challenge shifted from the willingness of acceptance to the speed of keeping up with emerging technologies and matching skills (Moller et al., 2008).

The ASTD Handbook of Training Design and Delivery (Piskurich, Beckschi, & Hall, 2000) identified the problems causing the ineffectiveness of WBI:

- Politics, such as sacrificing end users' needs on the basis of the power of some individuals;
- Design, such as inadequate learning principle considerations;
- Production, such as the focus on superficial visual quality rather than the overriding objectives of the program;
- Project management, such as budget and scheduling;

- Process, such as inadequate means to create early end user buy-in, and missing opportunity to implement late-arriving good design ideas resulting in mediocre products.

Ten years later, ASTD conducted a 2010 survey study. It revealed five critical barriers to effective ISD (p. 23):

- Lack of internal staff who are able to meet the needs of the ISD initiatives;
- Lack of proper funding for the right tool;
- Inability to measure the effectiveness of ISD;
- Keeping up with emerging technologies; and
- Difficulty of developing content specific to different geographical locations.

Among all the factors that impact WBI, instructional system design is considered to be most critical for effective Web-based instruction/training. “Particularly important to the effectiveness of Web-based training is the element of design” (Williams, 2002, p. 134). The following diagram lists the four factors that affect the WBI design process:

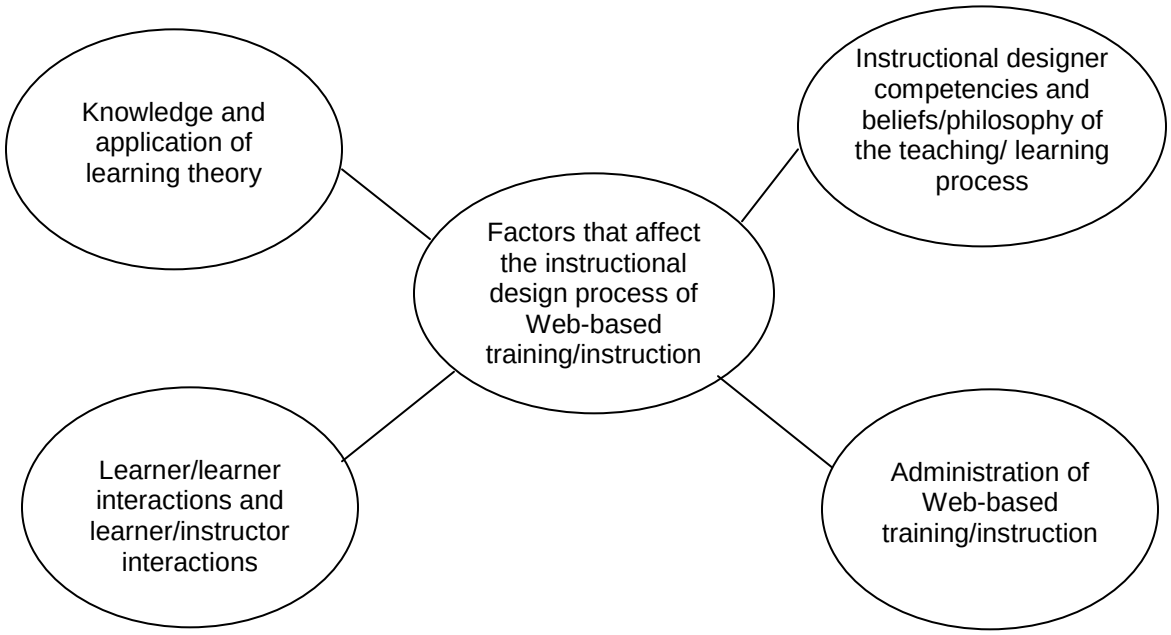

Figure 1. Factors that Affect the Instructional Design Process of Web-Based Training/Instruction[1].

Williams (2002) elaborated on the learning theories critical for the effective WBI design and the barriers that impeded the successful delivery of WBI from learners' perspective. She identified 36 learning principles and three interaction elements. It was not the focus of her study to identify the competencies for instructional designers in WBI. She agreed with Russ-Eft (1994) that WBI instructional designers who do not possess adult learning competencies and cannot apply them in a Web-based environment will impede successful WBI.

The Nature of Competency

Competency as a concept has been in existence in various forms since the early 1960s (Simpson, 2006). While competence is a state of being well qualified to accomplish an activity, task or job function, competency refers to the way that a state of competence can be demonstrated to the relevant organization (Spector & de la Teja, 2001). The idea of defining a set of competencies for each job in the organization may

[1] From "Instructional Design Factors and the Effectiveness of Web-based Training/Instruction" by S. Williams, 2002, p. 132. Copyright 2002 by Saundra Wall Williams.

mislead people by focusing on behaviors rather than on accomplishments (Gilbert, 1995). Gilbert (1995) concluded that accomplishment is worthy and valuable only when "the results the person produces [that] have values to the organization" (p. 44). Likewise, Simpson (2006), working in human resource management, claims, "Competencies are related to the job not the person" (p. 1). More precisely, what really matters is the individual outputs or accomplishments that lead to achievement of organizational goals (Teodorescu & Binder, 2004).

In accordance with Gilbert's argument, Esque and Gilbert (1995) defined competence as the "behaviors that assist the performer to overcome known barriers to achieving the performance standards" (p. 46). This definition captures not only the behavioral nature of competency, but also its value to the organization. The International Board of Standards for Training, Performance and Instruction (IBSTPI) incorporates another element, attitude, into its definition:

> …a knowledge, skill, or attitude that enables one to effectively perform the activities of a given occupation or function to the standards expected in employment. (Richey, Fields & Foxon, 2001, p. 31)

IBSTPI's definition was used in this study when discussing the expert instructional designer competencies.

Conceptual Framework of this Study

To identify and document competencies in a given function, competency modeling comes into play (Marrelli, 1998). Competency modeling refers to methods and the process of identifying and analyzing required competencies (Teodorescu & Binder, 2004). Diverse methods are used in competency modeling, including focus groups/expert panels, critical incident interviews, surveys, competencies databases, and observations.

As a continuous process, Marrelli (1998) recommended 11 steps for a successful competency analysis and modeling. Among those steps are selecting and applying a competency model to as small unit as a single job or as large unit as an entire organization. She went on to define a competency model as an "organization of identified competencies into a conceptual framework that enables the people in an organization to understand, talk about, and apply the competencies" (Marrelli, 1998, p. 10).

This study adopted the IBSTPI competency model, in Figure 2, to identify the full range of competencies commonly found in a group of expert instructional designers working in the WBI area.

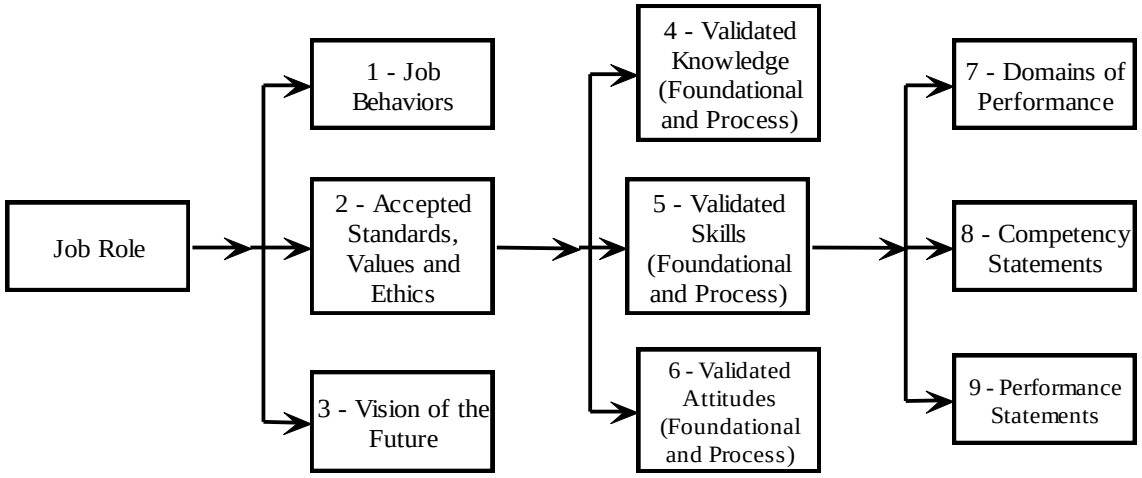

Figure 2. The Generic IBSTPI Competency Development Model[2].

According to the IBSTPI model, job behaviors, accepted standards, values, ethics, and vision determine the core competencies required in an organization. Validated knowledge, skills and attitudes are shown in clusters or categories of competencies critical to a particular job role. They are elaborated and additionally detailed in competency statements and their related performance statements.

[2] From "Instructional Design Competencies: The Standards" by R. C. Richey, D. C. Fields, and M. Foxon, 2001, p. 33. Copyright 2001 by ERIC Clearinghouse on Information & Technology.

Domains, competencies and performance statements are the three structural components included in the IBSTPI model of instructional design (ID) competencies. Competencies and performance statements are grouped in domains that parallel a systematic ID process – planning and analysis, design and development, implementation and management. A professional foundations domain is then added. This model is applicable to instructional designers working in a variety of contexts.

Expert Designers

"Instructional designers are expected to demonstrate characteristics of expertise in their professional practice" (Le Maistre, 1998, p. 21). The studies of expertise seek to understand and account for what distinguishes outstanding individuals in a domain from less outstanding individuals in that domain" (Ericsson & Smith, 1991, p.2). Those studies were mostly domain specific; however, there are many characteristics that experts share across domains to certain degree (Patel, Kaufman, & Magder, 1996).

Chi, Glaser & Farr (1988) analyzed the performance of experts and can be summarized as follows:

- Experts have a rich, well-organized knowledge base in the domain.
- Experts represent problems at a deeper level than novices do.
- Experts perform an extensive problem analysis.
- Experts have superior short-term and long-term memory.
- Experts detect large, meaningful patterns in a problem.
- Experts have excellent self-monitoring skills.

Supplementing Chi, Glaser and Farr's analysis, Shanteau (1992) also identified five psychological strategies that experts use:

1. Constantly adjusting their decisions;
2. Using help from others;
3. Obtaining decision aids;
4. Avoiding big mistakes, but accepting small errors; and
5. Decomposing a problem into manageable parts.

Concurring with Chase and Simon's (1973) finding, Ericsson (1996) supported the 10-year rule; however, "10 years of experience in a domain does not guarantee that expert performance is attained" (p.10). The expert performance is attained gradually over intense and deliberate preparation and practice. Moreover, it was observed that the maximal performance is relative to the level of other performances of that time as many individuals in a domain often match and even surpass the past level of performance in history (Ericsson, 1996).

The idea of using expert performers as role models to improve performance in an organization is not new. Large companies, such as Bell Labs, Du Pont, Sprint, and Unigate have adopted the expert performance model to improve their work forces (Froiland, 1993).

While industries use expert model to increase productivity, this study attempts to advocate optimal performance by focusing on identifying the expert level of instructional design. Considering the high demands and low quality of some WBI courses or programs, we need to renew the emphasis on developing competencies for ISD in the WBI field (Moller et al, 2008).

Purpose of the Study

The purpose of this study was to use the IBSTPI competency model to identify the competencies commonly existing in expert instructional designers who specialize in WBI. The research questions answered by this study are:

1. What are the domains in which expert instructional designers in WBI function?
2. What are the competencies that expert instructional designers WBI demonstrate?
3. What performance statements support each competency of expert instructional designers in WBI?
4. To what extent is the importance of each competency rated?
5. To what extent does the work environment impact competencies and performance statements?
6. What direction do expert instructional designers anticipate for WBI that may impact practitioners in WBI?

Definition of Terms

Web-based instruction. A hypermedia-based instructional program which utilizes the attributes and resources of the World Wide Web to create a meaningful environment, where learning is fostered and supported (Khan, 1997).

Competency. A knowledge, skill, or attitude that enables one to effectively perform the activities of a given occupation or function to the standards expected in employment (Richey, Fields & Foxon, 2001, p.31).

Performance statement. A detailed explanation of activities comprising a competency statement (Richey, Fields & Foxon, 2001, p.183).

Competency model. The organization of identified competencies into a conceptual framework that enables the people in an organization to understand, talk about, and apply the competencies (Marrelli, 1998, p.10).

Expert. An individual with the special skill or knowledge representing mastery of a particular subject through education and experience and demonstrating high level of competencies in practice.

Significance of the Study

Since the emergence of technology-based instruction, a new set of variables are being discovered and understood in terms of analyzing, designing, developing, implementing and managing WBI (Adams, 1992). The existing research extensively addressed the general effectiveness of WBI as compared to conventional instruction. Researches have been interested in identifying competencies required of instructional designers to produce effective instruction. Such interest was not particularly targeting on competencies for WBI. With the growing needs for WBI in many business sectors all over the world, clarification of these competencies and standards is thus called for (Guerra, 2001). It was hoped that the current understanding of effective WBI would be expanded to some extent by this study. The benefits of this research were two-fold: 1) to help organizations or groups interested in WBI ventures find the star performers, and 2) to help individuals grow and determine if they are competent enough to seek an advanced ID position in WBI.

Other than employee selection, competency modeling has many applications in the workplace, including employee career development, and determining rewards and compensation (Marrelli, 1998). With standards and competencies unambiguously identified in measurable behavioral statements, management personnel can use them to evaluate and "officially recognize the achievements a professional has made in his or her area of practice" (Stolovitch, Keeps & Rodrigue, 1999, p. 683). Organizational training curricula and academic degree curricula will also be able to use such competencies as guidelines for the preparation of future expert designers (Guerra, 2001; Larson, 2004; Hansen, 2010). This study was a response to both of the above needs. The results of this study can be used to help individuals, organizations, the professional society, and academic programs excel in the long run.

CHAPTER 2 REVIEW OF LITERATURE

This review of related research addresses previous competency studies and relevant research in the instructional design field. This review will highlight endeavors of competency modeling in ID, and move onto research efforts on identifying competencies among experts, including experts in instructional design and experts in other related practices.

IBSTPI Study

The International Board of Standards for Training, Performance and Instruction (IBSTPI) is a non-profit corporation organized in 1984 to develop standards in the area of training, performance and instruction. IBSTPI has published various competencies and performance statements. The three major projects and publications (http://www.ibstpi.org) are:

- *Instructional Design Competencies: The Standards* (initially developed in 1986 and revised in 2000);
- *Instructor Competencies* (first published in 1993, then again in 2003); and
- *Training Manager Competencies: The Standards* (originally set in 1989, completed a new set in 2001).

According to Richey, et al (2000), the 2000 IBSTPI ID competencies were supported by the following research and studies:

- The Atchison (1996) and Song (1998) studies that identified expert instructional designers' roles and competencies.
- The research that generated original 16 IBSTPI ID competencies.

- The focus groups of the 15 IBSTPI board members.
- Validation research and findings of the base competency list.
- Review and revision by the IBSTPI Board of Directors.

Table 1 shows three editions of competencies for instructional designers - the initial 16 core competencies developed by the joint task force, the 1986 version of IBSTPI ID competencies, and the 2000 version of IBSTPI ID competencies. The 2000 ID competencies have 23 updated competencies. All the competencies are "clustered into four general domains and are supported by 122 performance statements" (Richey, Fields & Foxon, 2001, p. 45). The four domains are professional foundations, planning and analysis, design and development, and implementation and management. The more notable feature is the distinction between essential and advanced competencies. "The earlier edition attempted to identify the basic set of competencies that all experienced instructional designers should possess. The present distinction between essential skills that apply to all instructional designers and advanced skills, is useful" (Keller, 2001, p. 108).

Richey, et al (2001) included four specialist roles in ID field. They are analysts, evaluators, eLearning specialists, and project managers. ELearning specialists are development-focused (Richey, Fields & Foxon, 2001). The study differs from the IBSTPI study by focusing on competencies of expert instructional designers who have been involved in all phases of a WBI project.

Table 1
Three Editions of ID Competencies for Instructional Designers by AECT/NSPI and IBSTPI

Joint Certification Task Force (AECT/NSPI)	**IBSTPI 1986 Version**	**IBSTPI 2000 Version**
• Determine projects appropriate for instructional development • Conduct needs assessment • Assess learner characteristics • Analyze the structural characteristics of jobs, tasks, and content • Write statements of learner outcomes • Analyze the characteristics of the learning environment • Sequence learner outcomes • Specify instructional strategies • Sequence learner activities • Determine instructional resources (media) appropriate to instructional objectives • Evaluate instruction/training • Create course, training package, and workshop management systems • Plan and monitor instructional design projects • Communicate effectively in visual, oral, and written form • Demonstrate appropriate interpersonal, group process, and consulting behaviors • Promote the diffusion and adoption of instructional development process	• Determine projects that are appropriate for instructional design • Conduct a needs assessment • Assess the relevant characteristics of learners/trainers • Analyze the characteristics of a setting • Perform job, task, and/or content analysis • Write statements of performance objectives • Develop the performance measurements • Sequence the performance objectives • Specify the instructional strategies • Design the instructional materials • Evaluate the instruction/training • Design the instructional management system • Plan and monitor instructional design projects • Communicate effectively in visual, oral, and written form • Interact effectively with other people • Promote the use of instructional design	Professional Foundations: • Communicate effectively in visual, oral and written form. (Essential) • Apply current research and theory to the practice of instructional design. (Advanced) • Update and improve one's knowledge, skills and attitudes pertaining to instructional design and related fields. (Essential) • Apply fundamental research skills to instructional design projects. (Advanced) • Identify and resolve ethical and legal implications of design in the work place. (Advanced) Planning and Analysis: • Conduct a needs assessment. (Essential) • Design a curriculum or program. (Essential) • Select and use a variety of techniques for determining instructional content. (Essential) • Identify and describe target population characteristics. (Essential) • Analyze the characteristics of the environment. (Essential) • Analyze the characteristics of existing and emerging technologies and their use in an instructional environment. (Essential) • Reflect upon the elements of a situation before finalizing design solutions and strategies. (Essential)

(*table continues*)

Table 1 (continued)

Joint Certification Task Force (AECT/NSPI)	IBSTPI 1986 Version	IBSTPI 2000 Version
		Design and Development: • Select, modify, or create a design and development model appropriate for a given project. (Advanced) • Select and use a variety of techniques to define and sequence the instructional content and strategies. (Essential) • Select or modify existing instructional materials. (Essential) • Develop instructional materials. (Essential) • Design instruction that reflects an understanding of the diversity of learners and groups of learners. (Essential) • Evaluate and assess instruction and its impact. (Essential) Implementation and Management: • Plan and manage instructional design projects. (Advanced) • Promote collaboration, partnerships and relationships among the participants in a design project. (Advanced) • Apply business skills to managing instructional design. (Advanced) • Design instructional management systems. (Advanced) • Provide for the effective implementation of instructional products and programs. (Essential)

The IBSTPI competencies are most extensively researched and validated instructional design competencies (Larson & Lockee, 2009).

Three Levels of Core Competencies

Tennyson (2001) developed a model to identify core competencies for instructional technologists (IT) in a technology-based environment. An instructional

technologist was referred to "a person who is employing the ID process to solve learning and performance problems and needs in a technology environment; for example, Web-based instruction" (Tennyson, 2001, p. 356). Such technologist can be a novice, apprentice, or expert, depending on the knowledge and skills in educational foundations, ISD methodology, and ID experience. By his definition, a novice has no prior core knowledge or skills in either area; an apprentice has educational foundations and limited ISD methodology, which can be acquired in formal education; an expert has strong core knowledge in all three areas (Tennyson, 2001). In other words, what differentiates an expert from the rest is the experience in instructional development process. Agreeing with other researchers, Tennyson believed experts are competent in problem identification and problem-solving (Kirschner, van Vilsteren, Hummel, & Wigman, 1997), and they spent more time in analyzing problems and needs before working on the solutions (Tennyson, 2001). Their thoughtful process and creativity of solving problems are the results of years of experience in applying the above mentioned core knowledge and skills. The minimum number of years of experience to reach the expert status was estimated to be five, regardless of fields and disciplines (Perez & Neiderman, 1992; Tennyson, 2001). Specific to instructional technologists in the field such as Web-based instruction, such experiences include problem-solving and solution planning, bridging between theories and practical implications, and planning and management, according to Tennyson (2001).

The five qualities an expert instructional technologist has relative to novices and apprentices are (Tennyson, 2001, p. 258):

- Possesses more foundational knowledge in learning philosophy, learning theory, and instructional theory.
- Better hierarchical organization of and access to ISD methodological knowledge.
- Spends more time analyzing given learning problem(s)/need(s).
- More easily recognizes problem(s)/need(s) solution patterns and alternatives.
- Understands learning problem(s)/need(s) at a more complex level.
- Monitors more careful, skillful and thoughtful solutions and development performances.

Tennyson (2001) admitted that the more complex a learning need is, the more possible alternative solutions there will be, and therefore the more years of experience are required. Additionally, maintaining the expert level is a "lifetime effort devoted to maintaining contemporary knowledge in both competency areas" (p. 359) – that is, educational foundations and methodology areas.

An ID core competency worksheet was presented for self-evaluation. There are three steps in which a score from one to three is assigned when a statement has been met. In the end, an expert should be identified to have the highest score, that is nine; an apprentice has a score ranging from five to eight; a novice has a score of three or four (Tennyson, 2001).

In summary, Tennyson's model has three levels, three competency areas, and three steps. Instructional technologists must have enough years of experience in ID process, in addition to strong knowledge in learning philosophy, learning theory, and instructional theory, "to assume the title of IT expert" (Tennyson, 2001, p. 360).

Context Differences for Instructional Design

To link between learning context and real-world context, Hansen (2010) piloted a study using job postings attempting to analyze the industry context. The rationale was "different contexts impose distinctly different practice" (Jonasssen, 2000, p. 116). Context in this study has been defined broadly as a body of factors where learning and performance occurs (Hansen, 2010). Hansen (2010) submitted to the idea that universities should develop context-oriented curricula to better prepare their graduates for the job market, so that they can "perform to a standard set of industry defined competencies" (p. 51). Current competency models typically cover the entire occupations, describing minimum competencies and non-specific performance outcomes without contextual information, according to Hansen (2010). Such competencies are consequently "insufficient" (Hansen, 2010, p. 54), "one-size-fits-all" (p. 66), and "difficult for learners to understand and apply" (p. 53).

To capture the context where instructional design is practiced, Hansen examined and coded 178 Internet job postings related with instructional design positions, with the automated analysis accomplished by software CAQDAS. The codes were then connected and four themes were identified: Direct contextual definition, environmental description, activity description, and personal characteristics (Hansen, 2010).

The direct contextual definition includes:

1. Title;
2. Alternate title;
3. Industry context;
4. Subject matter & sub-subject matter; and

5. Location.

The second theme environmental description includes:

- Company goals;
- Company policies;
- Physical context;
- Social context;
- Organizational hierarchy;
- External relationships;
- Internal relationship;
- Production interfaces;
- Company culture; and
- Communications.

The third theme activity description includes:

- Task;
- Tools;
- Production process;
- Production assessment;
- Product;
- Product assessment
- Standards; and
- Return on investment.

Lastly, the fourth theme personal characteristics include:

- Knowledge;

- Skills;
- Attitude;
- Education;
- Experience;
- Accountability;
- Motivation; and
- Coping strategy.

The contextual model created in this study "characterizes context but, more importantly, provides a basis for comprehending context and the design of instruction" (Hansen, 2010, p. 159).

This study also discovered trends in instructional design industry. Of all job postings analyzed, 77.46% products required to be produced were eLearning. The trend towards eLearning was supported by the observation of strong requirements of technical skills, especially computer skills followed by a long list of tools (Hansen, 2010). Hansen (2010) further noticed "more concentration on development tasks and a noticeable lack of emphasis for analysis and evaluation of learning" (p.160). On the other hand, the interest in specific domain knowledge has been increased significantly (Hansen, 2010), appropriated by a list of two-and-half-page long domain knowledge requirements. Some non-traditional instructional designer roles have been identified as well, such as Website development, facilitation and instructing, event hosting (Hansen, 2010). Overall, instructional design environments are fast-changing environments full of variables.

Job postings provide an abundant and unbiased source of information; they are nevertheless not sufficient to describe the context of instructional design environments.

Dissertations on ID Competencies

Competencies proposed by various professional organizations are not the only source of attempting to analyze competencies for expert instructional designers. Several doctoral studies have identified the competencies and performance behaviors for ID in general as well as for specific instructional environments, including Web-based instruction (Larson, 2004).

The first doctoral study to be reviewed is Atchison's (1996) dissertation. Atchison's study examined not what expert instructional designers should do but what they were doing and must do in practice (Anderson, 2000). His qualitative descriptive study was a response to Rowland's call of expanding research on what the instructional designers actually do (Atchison, 1996). The study was conducted with 15 subjects employed in four different settings with various professional experiences. It employed a critical incident survey, and followed with an audiotaped interview. As the result, nine role themes were identified. Each was described by a competency statement and sets of performance statements (Atchison, 1996). The nine role themes are mostly conceptual, as opposed to procedural steps or tasks prescribed in instructional design models (Atchison, 1996). The themes are reflector, ethicist, humanist, collaborator, advocate, evaluator, manager, marketer, and entrepreneur. All themes but one were "found most on human related issues" (Atchison, 1996, p. 58). In other words, Atchison (1996) believed these sets of knowledge, intuition (drawn from experience), and skills can be learned and refined. However, they cannot be learned from books and lectures, but rather "on the job, with real cases" (Atchison, 1996, p. 11). Atchison's argument is that "Experts have no

fixed way of operating because they are guided by the context they are in …" (Atchison, 1996, p. 11). He used this rationale to justify his qualitative and conceptual approach.

One of the limitations of the study is that the "selection of experts [was] based on professional organization membership rather than through evaluation of expert status" (Larson, 2004, p. 49). Atchison competency list for expert instructional designers was used by IBSTPI to "form the first base list of revised competencies" from its 1986's competency edition (Richey, Fields & Foxon, 2001, p. 144).

The second study to be reviewed is Simon's (2003) dissertation. Simon's study evaluated roles, output, and/or competencies of university faculty in the Web-based arena (Simon, 2003). This study was to answer the challenges of instructors who assumed the burden of teaching fully online. Based on Thach's (1994) competency model of distance education, Simon conducted a two-round survey to a group of self-assessed experts, who satisfied three criteria: working for academic institutions, teaching or serving in an administrative role or researching in WBI, and having at least three years' experience. This modified Delphi study, using two rounds of online survey yielded the result five roles, 32 outputs, and 27 competencies.

The five revealed roles, in the order of importance, are content expert, instructional designer, technologist, process facilitator, and manager. The key competencies in Web-based instruction listed and ranked by participants "corresponded with the literature" (Simon, 2003, p. 115), they are: communication skills, collaboration skills, group process skills, software knowledge, organizational skills, basic technology knowledge, content expertise, and facilitation skills.

Enlightened by the studies in the field of distance education in general, Simon didn't find "comprehensive research-based study on WBI competencies" (Simon, 2003, p. 68). Her study provided a descriptive model to "better understand, use, and benefit from online education" (Simon, 2003, p. 16). One finding of the study is that hands-on/constructivist and collaboration/teamwork were regarded by the experts to be the most effective ways of training and developing WBI competencies. Seminars and workshops were the least effective (Simon, 2003).

The third doctoral study to be reviewed is Larson (2004). The purpose of her study was to "identify how, and how well, IDT programs are preparing students for professional practice in different career environments" (Larson, 2004, p. 2). She conducted extensive literature review on competency standards and professional practices for the four instructional design technology (IDT) career environments. They are business and industry, higher education, K-12 education, and government/military. A summary of 12 competency studies by career environments is listed in Appendix A.

The procedure of Larson's study involved the use of a mixed methods approach: A quantitative survey followed by a qualitative case study. In phase I, a four-point Likert scaled survey was distributed by mail and online. The mail survey participants were from "systematically-selected sample of practitioners from three special-interest divisions of the Association for Educational Communications and Technology (AECT)" (Larson, 2004, p. 91). More specifically, the survey was mailed to 254 system-selected members in AECT's mailing list of its Instructional Design and Development Division, the Training and Performance Division, and the Distance Learning Division. The online survey was advertised and made available to all professionals in IDT with membership

within AECT, ISPI, and ASTD. No participants were expected to respond to both surveys. The results of the survey analyses were used to describe a big picture on the match between the participants' career preparation programs and their IDT work experience. The results also played a determinative factor in selecting exemplary programs for phase II case study. Phase II case study included semi-structured personal and telephone interviews with IDT educators, focus group with current students in the Instructional System program of Florida State University, and an analysis of program documents.

The findings of the research include:

- The majority of respondents felt somewhat prepared to fully prepared for general instructional design competencies, ID models, learning theories, and flexible design utilizing such models and theories.
- Slightly larger percentage of respondents felt they had minimal or no preparation for environment specific competencies, subject matter specific to their job roles.
- Forty percent or more survey respondents indicated they had issues at workplace cultural aspects when they first entered instructional design practice (Larson, 2005).

While it was not the intent of Larson's study to identify instructional design competencies specific to career environments, she agreed with the literature that it is essential to prepare "IDT students for a variety of career environments" (Larson, 2004, p.202). The recommendation derived from the case study is to prepare students with a

generalist approach, rather than career environment specific approach, with situated methods and cognitive apprenticeship (Larson, 2004).

The fourth doctoral study to be reviewed here is Thach (1994). The purpose of her study is to identify the roles, outputs and competencies of distance learning professionals within the United States and Canada. The study was accomplished by eliciting perceptions from experts in distance education. She borrowed the McLagan (McLagan, 1983; McLagan & Suhadolnik, 1989) process model for roles, outputs and competencies in her study.

The study was conducted with two rounds of mail surveys, which were distributed to members of ASTD. The chosen population met the criteria of teaching or serving in the distance education field in an academic institution for at least one year. Round one survey was open-ended. It provided lists of roles, outputs and competencies drawn from literature as reference to respondents. Eleven roles, 83 outputs, and 51 competencies were derived. Round two survey was the compiled inclusive list from round one survey, in an close-ended format. It was sent to the same respondents of round one survey. As a result, the top four roles were identified as administrator, instructor, technology experts, and instructional designer. The top ten competencies for the instructional designer's role were: (1) collaboration/teamwork, instructional design, ID for interactive technology; (2) media attribute knowledge; (3) knowledge of distance learning field; (4) teaching strategies; (5) evaluation; (6) group process; (7) writing; (8) support services knowledge; (9) needs assessment skills, learning styles and theory; and (10) presentation and training (Thach, 1994).

It is worth noting that the competencies were purposed for distance education professionals who are "teaching or working in an administrative/support roles in the field of distance education. This can be either a university or industry/business setting" (Thach, 1994, p.4). However, the population of this study came from the academic setting only, meaning universities and colleges.

Summary

This section began with a review of the IBSTPI competency study with a brief description of its three editions of competencies evolved over time. Successively was Tennyson's three level of core competency study for self-assessing the level of expertise for instructional technologist in a technology-based environment. Next was Hansen's extensive study to analyze industry context differences for instructional design using Internet job postings. It was then followed by examining four doctoral studies, with topics varying from competencies for ID experts to competencies perceived by distance education experts. The purpose of the reviews was to find support on identifying competencies especially for experts in WBI from previous studies. The review of the related literature revealed that a practitioner in instructional design can play many roles. The required knowledge and skills can therefore be grouped into several competency domains specific to their roles. It was agreed that competencies are context- or career-specific. They can be acquired on the job over years of experience.

CHAPTER 3 METHODOLOGY

This section describes how this study was conducted. The first part discusses the participants in the study, followed by the research design and instruments used for data collection. A description of the pilot study is presented for the instrument testing. Lastly is the report of the step-by-step procedures and general account of data analysis showing how the study was accomplished.

Participants

The objective of this study was to identify the competencies of expert instructional designers working in WBI. Consistent with this objective, the 15 interview participants of the study served as the expert panel since they were experts in the field of instructional design and development specialized in WBI. The second group of participants, or the survey participants, rated the competencies extracted from the expert panel inputs.

Given the nature of qualitative research design, the sample selection for the interview group was non-random, purposeful, and small (Merriam, 2009). Quota sampling technique was used. There were five criteria for the interview population:

1. Having at least ten years of work experience in instructional design, including five years specialized in WBI.
2. Participated in WBI projects as a leading instructional designer for at least three years.
3. The WBI projects they participated in those three years must be fully Web-delivered courses.

4. Working in the WBI field during the time of participating in this research.
5. Earned at least a Bachelor's degree in Education, Instructional Design /Instructional Technology, Training and Development, or a related field. A Master's degree in those fields was preferred.

The criteria for the survey population were:

1. Involvement in instructional design for Web-based instruction before or during participating in this research.
2. Business operation or employment based in U.S.A..
3. Never participated in the interviews.

The individuals meeting the above criteria were identified from two sources. The first source was professional recommendation by peers, alumni, faculty and managers in the WBI. The second source was members from professional organizations: the American Society for Training & Development (ASTD), the International Society for Performance Improvement **(**ISPI**)**, and other professional groups at LinkedIn**.** These organizations have been chosen because (1) they have a large membership in the fields related to this study, and (2) there was convenient access to the members. ASTD is dedicated to workplace learning and performance professionals. Its members work in thousands of organizations of all sizes in various settings, as independent consultants or employed individuals. The researcher was an active member of both ASTD and its local chapter Greater Detroit ASTD (GDASTD), which enabled direct access to other members. The search for interview participants continued until 15 participants were identified. One additional participant was added later because a prior participant was dis-qualified during the interview process. The recruitment of 30 survey participants took place simultaneously

with the survey launch – the survey link was provided in soliciting emails and LinkedIn group discussion postings. In other words, the survey was open to everybody, requiring no invitation. The criteria, however, were presented in the emails and postings, and further validated in the survey with mandatory questions. The survey stayed open until 31 complete responses were received because one participant's response was excluded as a result of a self-reported error.

The participants of the study were divided into two groups – the first group included 15 participants for interview, and the second group included another 30 participants for survey. The first 16 participants (one was excluded later) contacted who agreed to be interviewed were in the first group, the rest fell under the second group. Participants recruited through open LinkedIn postings filled the gap of by personal recruitment.

Research Design

The data collection of this study had two phases: Interviews and an online survey. The interviews were conducted by Web, telephone, or face-to-face meetings. Interviews utilized open-ended questions, while the survey collected both open-ended responses and numeric rating data. Mixed methods were therefore utilized.

The main purpose of the interviews was to collect sufficient data to compose the list of competencies categorized in knowledge, skills and attitudes featuring expert designers in WBI. The online survey was intended to determine the relative importance of each competency item in the entire list.

The interviews employed the critical incident technique; the participants were asked to reflect upon the process, tasks and skills they used in one WBI project that

rewarded them with either personal pride or external recognition. This technique allowed best representation of the full process of instructional design.

Instrumentation

The interview instrument included 19 questions that were open-ended and structured to answer the first three research questions and research questions five and six. The first three research questions focus on discovering the domains in which the expert Web-based instruction designers work, and the competencies qualifying them as experts (See Appendix B for a copy of this instrument). Information addressing research questions five and six on the environment impact on competencies and perception of the future was also collected in the interview instrument. The interviews were digitally recorded and transcribed.

In the second phase, an online survey was implemented. The survey link was enclosed in emails and forwarded to the second group of participants. The link was also provided in the postings at nine LinkedIn professional groups. The survey was designed such that the answer to research question four would be drawn. The participants of the survey were asked to:

1. Provide demographic information.
2. Rate the importance of each competency on a Likert scale.
3. Provide any additional information or suggestions.

Pilot Study

Two separate pilots were conducted.

The first pilot was to test the interviews. Two participants were contacted individually to schedule an interview. The first pilot interview was a face-to-face

interview, the second was a remote interview. WebEx was chosen for this remote interview. The Research Informed Consent form and interview questions were emailed a few days before the scheduled date. A separate email with the meeting instructions was sent from WebEx to the remote participant directly. The duration of the interview was projected to be one hour. The conversations were recorded. Attention was given to how well the questions and answers flow, the understanding of terms, the appropriateness of the chosen platform, the functioning of recording, and timing. After the pilot with the first pilot interview participant, it was noticed that:

- The criteria to participate in the interview were not clear to the participant.
- The participant answered only part of a question if that question had multiple parts.
- There was no opportunity for the participant to give other opinions.
- The duration was shorter than estimated.
- The participant was nervous.

Modifications were therefore made accordingly, such as adding criteria validating questions, adding a catch-all question as Question 14, breaking questions down so that no question had any subordinate questions, revising words and the order of the interview questions. After the revision, a second participant was interviewed. The second pilot interview was conducted with the revised questions and on a different platform. It demonstrated that the participant was very comfortable with Web interview. Also, the initial instructions from WebEx were sufficient; therefore no additional instructions were given. No issue stood out other than the duration was still much shorter than estimated. A demographic question was therefore added; another catch-all question was added at the

end of the interview. The pilot interviews were transcribed and analyzed partially for potential categories of skills. The process of pilot transcription and analysis attempt allowed a better understanding of what the interviews should focus on, which was the knowledge, skills, and attitude used or deemed necessary by the participants. Where and how the participants brought up such key content mattered little. This finding suggested the researcher pay closer attention to the actual content and call for immediate clarification when necessary.

Similarly, the online survey was pre-tested by three participants. They each were informed of the objectives of the study and the pilot survey link. In particular, they were asked to note the time spent on the survey, anything ambiguous or confusing, or any technical issues. Their feedback, other than the answers to the survey questions, was recorded. They also sent feedback to the researcher in emails. The three pilot survey participants reported no technical issues. The duration was 5 minutes and 13 minutes, respectively. The third pilot survey participant forgot to track timing. They suggested language revision, such as spelling out acronyms, clarifying researcher's two names, and correcting grammatical mistakes. Minor revisions were therefore made.

The five participants in the pilot study were not included again as participants of the remaining study. Their responses were therefore included neither in data collection nor analysis.

Data Collection

The procedures for data collection are summarized below:

1. *Interview confirmation and scheduling*. The participants were confirmed in advance by phone calls or email about their participation. Each individual was

scheduled a convenient time to be interviewed. The interview took place mostly during lunch breaks or evenings, rarely weekends and holidays.

2. *Convenient location*. Most interview participants preferred a Web or phone interview. When a face-to-face interview was desired by either a participant or the researcher, a location was chosen by the participant or proposed by the researcher. It was anywhere near the participant' home, workplace, or anywhere in the commuting route of his/her home and workplace. The interview took place in a room without distraction or interruptions.
3. *Delivery platform*. The interviews were delivered by World Wide Web, teleconference service, or a direct face-to-face meeting. Out-of-state participants were interviewed remotely by Web or teleconference. For participants living within the driving distance from the researcher, they either chose their preferred platform or let the researcher decide.
4. *Preparation communication*. Instructions on the interview and a list of structured interview questions were sent in advance via email to the interview participants, together with the Research Informed Consent form (see Appendix D). The participants were instructed on how to access the interview Website or teleconference service, if applicable. Usually the interview started with Question 1, unless there was a special need to begin in a different order. The participants were told to return in email the signed Research Informed Consent form before the interviews.
5. *Structured interview*. The critical incident technique was used - the participants were asked to identify one of their most satisfied projects to

discuss the competencies for expert instructional designers in WBI. All participants were asked the same pre-designed questions. It was possible that additional clarifying questions were asked, or casual comments were made to certain individuals. The interview questions were provided in advance for participants to contemplate.

6. *Audio recording*. The interviews were digitally recorded for later transcription. Minimal notes were taken during the interviews.
7. *Duration*. The interview was estimated to run for about one hour. This was modified by changing interview techniques from the pilot study. The interviews ranged from one hour and ten minutes to two hours and forty minutes. An additional interview was added to replace a disqualified participant. The time to complete all 16 interviews was approximately six weeks.
8. *Courtesy*. A thank-you email was sent to each interview participant after the interview. The Research Informed Consent form bearing the researcher's signature was scanned and attached in the email for the participant's record. Reminder emails were sent to those participants who did not return the signed Research Informed Consent forms. Participants were also promised to receive research results upon completion of study.
9. *Online survey*. The second group of participants, or the survey participants, received an email containing the online survey (see Appendix J) link and a deadline. The online survey link was also posted on several professional group Websites or discussion forums. The Research Informed Consent form for the

survey (see Appendix E) was embedded in the survey body. To begin the survey, the participants had to click a button to indicate their consent. The participants were not required to answer all questions, except for the first few policy and filtering questions. However, only responses from those who completed all questions were included for analysis. The survey was set up to close automatically as soon as 30 complete responses were reached. One more complete response was later included because a participant indicated in the feedback field that his/her rating on the 20 competencies was accidently reversed. The response from this participant was thus excluded from the study.

Data Analysis

The second phase of the study, which was a survey, was based on the results from phase one. In other words, the data analysis started before the full completion of data collection. Once the interview phase ended, the interview recordings were transcribed for interpretation. Keywords, coding and other techniques were employed to efficiently generate an expected list of performance statements. The identified performance statements were further grouped into competencies categorized under the domains. This list of competencies became the base of phase two the online survey. Once phase two was completed, survey results were calculated quantitatively. The average rating of importance of each listed competency was identified. Any confidential information was removed from the audio transcriptions.

The timeline for the data collection and analysis for the study is presented in Table 2.

Table 2
Timeline for Data Collection and Analysis

Time	Focus	Methods
09/30/2011 – 11/17/2011	▪ Obtained HIC expedited approval ▪ Networked	▪ Attended chapter meetings ▪ Joined professional organizations ▪ Set up LinkedIn account
11/17/2011 – 12/18/2011	▪ Recruited participants ▪ Conducted the two pilot interviews ▪ Transcribed pilot interviews ▪ Analyzed pilot interviews ▪ Modified interview questions ▪ Scheduled more interviews	▪ Emails ▪ Phone calls ▪ LinkedIn connections and contacts ▪ Interviews ▪ Notes ▪ Audio recordings ▪ Transcribing tools and software
12/19/2011 – 01/24/2012	▪ Continued the recruiting process ▪ Conducted 16 interviews ▪ Transcribed a few interviews	▪ Emails ▪ Phone calls ▪ LinkedIn connections and contacts ▪ Interviews ▪ Audio recordings ▪ Transcribing tools and software
01/25/2012 – 02/04/2012	▪ Transcribed the remaining interviews	▪ Transcribing tools and software
02/05/2012 – 02/18/2012	▪ Analyzed transcriptions with keywords & codes ▪ Tabulated interview data ▪ Created performance statements ▪ Created competency list	▪ Excel spreadsheet ▪ Word document
02/19/2012 – 02/25/2012	▪ Recruited pilot survey participants ▪ Launched the pilot survey ▪ Revised the survey	▪ Emails ▪ Zoomerang survey
02/27/2012 – 03/02/2012	▪ Launched the survey	▪ Zoomerang survey ▪ Emails ▪ LinkedIn connections and contacts ▪ LinkedIn group discussion sites
03/02/2012 – 03/20/2012	▪ Analyzed data ▪ Wrote Chapters 3 and 4.	▪ SPSS ▪ Excel spreadsheets

CHAPTER 4 RESULTS AND FINDINGS

This chapter presents findings from the analysis of the data collected from 45 participants. The primary objective of this study is to discover the domains of expertise, the competencies, and the performance statements of the competencies to perform at the expert level for the role of instructional designers in WBI. Twenty competencies with 91 supporting performance statements grouped under four identified domains are presented to fulfill this objective. The secondary objective is to decide how important each competency is relative to the other competencies. A ranked competency list is provided. The third objective is to understand if work environments had any effects on the expert performance. A cross-referenced table realizes this objective. The fourth objective is to understand the future of Web-based instruction and its impact on instructional designers. An accumulated descriptive list fulfills the last objective.

Description of the Sample

Demographics

There were two groups of participants. One serving as the expert panel was the interview group; another was the survey group. The second group doubled in size compared to the first group. Table 3 describes the general demographic information of the first group. Table 4 portrays the general demographic information of the second group.

Table 3
Characteristics of Participants in the Interview Group
(N=15)

Gender		Age Range		Business Nature		Education		Business Size	
Female	60%	25-35	0%	Business/Industry	73.30%	Bachelor's	6.70%	<100	13.40%
Male	40%	36-45	53%	Education	6.70%	Master's	66.70%	101-500	13.30%
		46-55	20%	Government/ Military	6.70%	Doctorate	26.70%	501-1,000	13.30%
		>56	27%	Healthcare	6.70%	N/A	0.00%	1,001-2,500	6.70%
				Independent	6.70%			2,501-10,000	20%
				Other	0%			>10,000	33.3%

Table 4
Characteristics of Participants in the Survey Group
(N=30)

Gender		Age Range		Business Nature		Education		Business Size	
Female	60%	25-35	13%	Business/Industry	40%	Bachelor's	27%	<100	10%
Male	40%	36-45	30%	Education	10%	Master's	53%	101-500	10%
		46-55	40%	Government/Military	17%	Doctorate	13%	501-1,000	13%
		>56	17%	Healthcare	20%	N/A	7%	1,001-2,500	7%
				Independent	3%			2,501-10,000	17%
				Other	10%			>10,000	43%

Table 3 shows that there were more female expert instructional designers working in WBI than males. More than half of the expert instructional designers in WBI were between age 36 and 45, and approximately a third were at age 56 and above. It is safe to

conclude that the experts were middle-aged. Over 70 percent of them were employed in the business or industry sector. Thirty three percent were from organizations with over 10,000 employees, 20 percent were from organizations sizing between 2,501 and 10,000 employees. Ninety three percent of them had a Master's degree or above.

Table 4 displays that there were more female instructional designers working in WBI than males. Thirty percent of the instructional designers in WBI were in the age range between 36 and 45, and another 40 percent were between 46 and 55. In other words, the majority of them were middle-aged. They clustered in the business or industry sector, followed by healthcare. Forty three percent were from organizations at the size larger than 10,000 employees, 17 percent were from organizations at the size between 2,501 and 10,000 employees. More than half of them earned a Master's degree.

As mentioned in the previous chapter, the participants in the interview group met the criteria of expert instructional designers in WBI defined in this study, while the participants in the survey group didn't have to. The two criteria for the survey participants are being an instructional designer involved in WBI and they were not in the interview group. As a result, survey participants may or may not be expert instructional designers themselves in WBI, while the interview group is a validated expert group. The demographic data in Table 3 and Table 4 present differences in that:

- Nobody in the interview group was in the age range between 25 and 35.
- The interview group had a higher percentage of instructional designers in WBI at age 56 or above than the survey group did.

- The individuals in the interview group gathered more in the business or industry sector, while the survey group had a more diverse spread across different sectors of business.
- The interview group had a higher percentage of instructional designers in WBI earned a Master's degree as their latest degree, while the survey group had more instructional designers in WBI earned a Bachelor's degree as their latest degree. Furthermore, the interview group had a higher percentage of instructional designers in WBI earning a doctorate degree than the survey group did.

In brief, the findings from these two tables suggest that expert instructional designers in WBI tend to be older, had higher education, more likely working in the business or industry sector than non-experts.

Professional Experience

Another set of information about the participants was their professional experience: the job titles and the years of experience in WBI as instructional designers. Table 5 and Table 6 list the most recent job titles for the two groups at the time of research. One participant in the interview group did not have a job title. "I don't have any, I work for a company where we do not do those." (Transcription for Interview 007, line 4).

Table 5
Job Titles of Participants in the Interview Group
(N=15)

No.	Job Title
1	Principal Instructional Designer
2	Lead Instructional Designer
3	Manager of Instructional Development
4	Instructional Designer (Independent)
5	Instructional Designer
6	Principal Training and Development Specialist
7	(NA)
8	Senior Instructional Designer
9	Instructional Designer and Technical Writer
10	Leadership of Professional Development
11	Assistant Professor
12	Knowledge Management Leader
13	Senior Instructional Design Consultant
14	Learning Developer
15	Program Director

Table 6
Job Titles of Participants in the Survey Group
(N=30)

No.	Job Title
1	Workforce Programs Specialist
2	Senior Trainer
3	Training Manager
4	Training Specialist
5	Manager, Talent Development
6	Instructional Technology Performance Catalyst
7	Training Coordinator
8	Training Instructor
9	Senior Learning & Development Consultant
10	Senior Instructional Designer
11	CEO and Learning & Development Leader
12	Senior Instructional Designer
13	Freelance Instructional Designer
14	Senior Instructional Design Consultant
15	Senior Instructional Designer
16	Learning Manager
17	Training Specialist

18	Instructional Designer
19	Manager, Instructional Design - contract
20	Instructional Designer
21	Instructional Designer
22	Instructional Systems Design Specialist
23	Instructional Designer
24	Instructional Designer
25	eLearning Consultant / Higher Ed Faculty
26	Senior Instructional Designer
27	Senior Analyst and Developer
28	Senior Instructional Technologist
29	Senior Instructional Designer
30	Learning Manager

The variety of the job titles suggests that instructional designers, whether they are experts or non-experts, functioned in different positions. Another interpretation for the job title variation is that organizations didn't label the instructional designers in the same way, or simply "do not have a formal job title of 'instructional designer' " (Richey, Fields & Foxon, 2001, p. 36). However, some organizations did give their instructional design professional a job title which indicated a senior or leading level, for example "principal", "lead", "manager", "senior", "leadership", "leader", and "director". In the interview group, nine out of 15 participants, which is at 60%, carried those job titles indicative of seniority. In the survey group, 14 out of 30 carried such job titles, which is 47%. It was possible that some survey participants were no longer doing instructional design in WBI at the time of survey. Their job titles consequently did not reflect any aspects of instructional design.

Table 7 describes the years of work experience in the WBI field as an instructional designer for both interview and survey groups. Because the survey group participants were not required to be experts, the number of years worked as lead instructional designers in WBI was not collected for the survey group.

Table 7
Years Worked in Web-based instruction as an Instructional Designer

No.	Years in WBI (Interview Participants)	Years as Lead (Interview Participants)	Years in WBI (Survey Participants)
1.	11	6	3
2.	15	15	2
3.	15	11	22
4.	10	3	10
5.	6	4.5	12
6.	11	9	10
7.	12	4	10
8.	16	8	10
9.	12	4	8
10.	14	14	7
11.	10	10	8
12.	8	8	3
13.	10	10	5
14.	8	8	15
15.	7	4	11
16.			5
17.			3
18.			3
19.			10
20.			13
21.			10
22.			15
23.			10
24.			2
25.			7
26.			10
27.			5
28.			12
29.			15
30.			14
Average:	**11**	**7.9**	**9**

Although Kidd (2010) described 1990 to 1995 as the era of Web Based Training, "it was not until about 2001 that advances in learning technologies really began to take off, as did the utilization of eLearning by corporations." (Comstock, 2010, p.10). In Comstock's (2010) thesis, the term Web-based training/instruction and eLearning were identical. Considering this timeline as Web-based training being widely adopted by companies, we can regard instructional designers with over 10 year experience in WBI were forerunners in the field.

Educational Background

The third set of information about the participants was their educational background: highest degree and majors they last graduated with. The former has been discussed in the first section "Participant demographics"; this section focuses on what the participants have studies in school. Table 8 lists the majors of the interview group participants and the survey group participants.

Table 8
Majors of the Last Degrees by Participants

Major of the Last Degree (Interview Group Participant)	Major of the Last Degree (Survey Group Participant)
Industrial Organizational Psychology	Instructional Technology
Art	Medical Laboratory Science
English Literature	English/Education
Education and Instructional Technology	History
Training and Development	Instructional Design
Instructional Technology	Communication
Human Resources Development	Elementary Education

Educational Technology	Instructional Design & Technology (NA)
	Training and Development
	Business Administration
	Performance Improvement & Training
	Performance Improvement & Instructional Design
	Human Resources
	Educational Technology
	Education
	Instructional Systems
	Instructional Design for Online Learning
	Instructional Systems Development
	Information Systems

Table 8 shows that one survey participant did not have a four-year college degree. One of Richey, Fields & Foxon's (2001) assumptions is that instructional designer should be able to demonstrate their competencies regardless of their training. Nevertheless, having an academic degree is a strong credential for having completed a formal training. It is evident in Table 8 that a formal training in the related field is desired by the majority of the employers and therefore by employees -- an overwhelming percentage of participants earned degrees in the majors closely related to instructional design.

The two lists do not include other majors the participants studied in the previous degree programs. It would be interesting to track how professionals became attracted to instructional design profession by looking at their records of academic pursuit. It is, however, beyond the scope of this research.

This section investigated the general characteristics of the sample population: gender and age distribution, the types of business they work for, and their educational levels. Their educational backgrounds were further examined by looking at the majors of their latest degrees. Participants' professional experiences were also studied. As Shanteau (1992) pointed out, "Having an adequate grasp of domain knowledge is obviously a prerequisite for being an expert" (p. 256). Domain knowledge comes from textbook knowledge about facts and theories, insights gained from related experience, and case based reasoning (Shanteau, 1992). However, Shanteau (1992) admitted it is not sufficient for experts. The next section focuses on the skills and competencies from the performance perspective.

Performance, Competencies, and Domains

In order to identify the domains, competencies, and performance statements of the expert instructional designers in WBI, the research started with identifying performance statements by interviewing a group of experts in depth. Competencies were later identified by merging the performance statements into groups. The domains were done in the similar manner.

Fifteen separate interviews were scheduled for 15 participants. The 15 individual participants were either self-selected after reading the research advertisements at the Great Detroit ASTD and ISPI National websites, or volunteered after being approached

by emails. The website advertisements and the emails clearly listed the five criteria to participate in the research. Such emails were sent to those who were considered potential candidates by screening through their available LinkedIn profiles. The potential candidates checked their background against the five criteria. Consent was communicated thereafter. Their participation qualification was validated again in the interviews. The first ten questions in the interview were designed to collect demographic data and to validate the qualification. It was noticed during an interview that one participant didn't meet the five criteria. The interview was completed nevertheless; a 16th participant had to be scheduled. All interviews were completed in one session, except for one interview where the participant had to leave to finish a project that day, so a second interview was scheduled. There were five face-to-face interviews, eight WebEx interviews, and two phone interviews. The five face-to-face interviews took place in various public libraries. Room reservations were made accordance with the libraries. The researcher arrived at the libraries earlier to do a field check, when the advance reservation was not allowed. Free trial subscription to WebEx was used initially, and later became upgraded to one month paid service. Of the two phone interviews upon the participants requests, one was conducted using a regular residential phone line, another was conducted using a teleconference service. A high end hands-free phone set optimal for audio conference was used in both phone interviews. Minimum technical issues occurred during interviewing: A loss of Web connection within a firewall and low audio quality in WebEx. They were resolved by utilizing the audio conference feature of WebEx. Another technical issue was that the memory ran out in the digital recorder during a face-to-face

interview. The researcher had to rely on note taking for the last three questions, and later went back to the participant for addition and revision.

All 16 interviews were digitally recorded with Olympus LS-7 in PCM wave format. Additionally, the eight WebEx interviews were also recorded using WebEx recording function and Express Scribe dock function. The WebEx recordings were transferred to the researcher's hard drive and deleted from the WebEx server before discontinuing the paid service. The qualified 15 interviews were transcribed to text with several tools: Microsoft Media Player, Express Scribe, Naturally Dragon Speaking Platinum 10. The disqualified interview participant was not transcribed and therefore not included in data analysis. The total number of the pages for the transcriptions of the 15 interviews is 211. Each of the 15 transcriptions was fully marked with line numbers at the left (see Appendix F). By reading 211 pages, 91 performance statements were generated progressively and documented in Word, each given a numeric code. Those codes were marked on the left or right margin of the transcriptions whenever a matching performance was identified, together with a pair of parentheses to indicate the beginning and ending of the performance within the paragraph. The performance statement list expanded sometimes with the progress of reading new transcription. It was therefore necessary to go back to read previous transcriptions again. As soon as reading and coding transcriptions were done, the line numbers were entered into an Excel spreadsheet (see Appendix G). The Excel spreadsheet had 91 performance statements and their representing codes in the left columns, and 15 participants' unique identification numbers from 001 to 016 in the top row. Each occurrence of a performance in the transcriptions was entered into the Excel Spreadsheet with a corresponding line number or numbers. By

the end of the data entry, the occurrences of 91 performance statements were summed up separately for each participant. The rest of the data analysis was based on this processed data.

Appendix L lists the 91 performance statements by the order they were identified in the transcribing process.

The identified performance statements were merged into categories of skills or attitudes. The new categories of skills or attitudes became the competencies. For example, performance statements 23, 26, 28, 61, 69, 73, 74, and 78 were merged into one competency "Communicate effectively, in visual, oral, and written formats":

23. Write and edit text clearly, correctly and appropriately for the target audience.
26. Communicate clearly and effectively in a language understood by developers.
28. Ask the right questions to extract information from SMEs and stakeholders.
61. Apply message design principles for screen design.
69. Listen well to understand and translate information for instruction.
73. Negotiate with customers, vendors or stakeholders to manage expectations, goals, and resources.
74. Present in meetings.
78. Sell ideas, proposals, or expertise to the management.

As the result, 20 competencies were identified. The four domains in the IBSTPI model were appropriate and applied for the identified competencies of this study. The complete list of domains, competencies, and supporting performance statements were given in Table 9 below.

Table 9
Domains, Competencies, Performance Statements for Expert Instructional Designers in WBI

Professional Foundations

1. **Communicate effectively, in visual, oral, and written formats.**
    - Write and edit text clearly, correctly and appropriately for the target audience.
    - Communicate clearly and effectively in a language understood by developers.

- Ask the right questions to extract information from SMEs and stakeholders.
- Apply message design principles for screen design.
- Listen well to understand and translate information for instruction.
- Negotiate with customers, vendors or stakeholders to manage expectations, goals and resources.
- Present in meetings.
- Sell ideas, proposals, or expertise to the management.

2. **Build trust with others by acting positively, respectfully, and diligently.**
   - Pay attention to details.
   - Be patient.
   - Respect others and treat them fair and professionally.
   - Be passionate and enjoy your job.
   - Self-motivated, committed and positive.
   - Adapt to criticism and changes without taking personally.
   - Set an example by working hard.

3. **Apply research results and instructional theories to the practice of Web-based instructional design**
   - Promote and apply instructional principles, theories, and research results to the instructional system design process.
   - Read widely on professional discussions and publications.

4. **Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction.**
   - Be creative and innovative.
   - Study the knowledge of the subject matter with interest and curiosity.
   - Maintain good computer skills in general.
   - Learn and try out emerging technologies and methodologies, be open minded.
   - Join professional organizations and social groups and attend the meetings and events, physically or virtually.
   - Network regularly with other professionals.
   - Get professional certification or recertification.
   - Update knowledge and skills by going back to school for formal training.

5. **Identify and comply with legal, ethical, and regulatory requirements.**
   - Keep proprietary information confidential and follow the required procedures.
   - Comply with participating employee's union regulations and policies.

6. **Successfully complete multiple tasks and responsibilities.**
   - Work on multiple projects at a time.

- Work with the combined roles of project manager, instructional designer, instructional developer in a given project.

Planning and Analysis

7. **Conduct a needs assessment pertinent to the goals of the Web-based instruction.**
   - Analyze the given data (needs analysis, course requirements, performance analysis, existing content etc.) from customers or stakeholders.
   - Identify the needs and performance gap.
   - Align business goals to instructional objectives.

8. **Analyze the characteristics of the target audience.**
   - Collect, understand and analyze learner characteristics.
   - Analyze the characteristics of the learning environment.

9. **Conduct task analysis and content analysis.**
   - Undertake content research and analysis utilizing existing or public resources.
   - Conduct focus group to assist task analysis.
   - Observe and analyze master performers to assist task analysis.
   - Chunk or sequence instructional content for a course.
   - Organize a set of related content into a curriculum or program.

10. **Analyze the characteristics of available technologies and tools for the Web-based instruction project.**
    - Identify the capabilities of commonly available software and tools.
    - Determine appropriate technique, technology, and media to support learning objectives and strategies.
    - Evaluate and determine appropriate tools for design and development.
    - Identify the potentials and limitations of WBI.

Design and Development

11. **Determine appropriate instructional strategies and techniques.**
    - Create relevant learning objectives and corresponding instructional strategies.
    - Design and develop appropriate interactivity or instructional activities to allow learners to practice, apply, and engage.
    - Design visually appealing instructional materials.
    - Add interesting and fun elements to the learning experience.

12. **Design instructional materials for development.**
    - Create storyboards with descriptions for graphics, audio, video, interaction, and simulation, as well as audio scripts.
    - Develop and utilize testing and review strategies for quality control.
    - Write design documents.

13. Develop instructional materials.

- Ensure the interface is created and compatible with other media elements.
- Revise as necessary based on the feedback from customer(s) or sample audience.
- Create a prototype to communicate the look and feel and/or basic functionality.
- Create and edit graphics and other non-multimedia instructional materials.
- Produce and edit animation, video and audio Web materials.
- Do programming or coding with computer languages.
- Direct, monitor or act in the audio or video recording.

14. Evaluate and assess the Web-based instruction and its impact.

- Validate content or strategies by formative or summative evaluation or both with sample audience onsite or remotely.
- Develop and implement level 1 and/or level 2 evaluation plans.
- Develop and implement level 3 and/or level 4 evaluation plans.
- Run statistic research and analysis on the collected evaluation data.
- Recommend other instructional or non-instructional interventions using the evaluation data.

15. Design instruction to be appropriate for global usage.

- Ensure the instructional content is appropriate in language and culture for global audience and translation.
- Be sensitive to accessibility design.

Implementation and Management

16. Deliver and implement end products.

- Deliver and implement the end product (to the customer) in a format or platform appropriate for the learning and management environment.
- Understand and utilize LMS or other implementation environment for implementation, training management and possibly performance improvement recommendation.
- Set up and schedule training sessions.
- Administrate registration process.
- Facilitate training sessions.
- Deliver instructions and training synchronously or asynchronously.

17. Plan and implement assignments and resources to achieve project goals.

- Manage budget.
- Lead, manage, and coordinate with team members.
- Support and coordinate with the project manager/ manager.
- Plan and stage a sign-off or buy-in process with the customer/stakeholders.
- Select and partner with the vendor or get support from another team.
- Keep track and report on project progress.

- Manage time efficiently.
- Organize and archive documents and other materials.
- Create project plans.
- Recruit and allocate human resources.

18. Promote efficiency and effectiveness for internal and external collaboration.

- Educate, mentor, and provide documentations to the team or other related staff about the right procedure.
- Create efficient workflow and platform for internal and external collaboration.
- Provide operational templates, other technical specifications, standards, and repository to achieve efficiency and consistency within the team.
- Work with remote team members, SMEs, and customers/vendors/ stakeholders.
- Collect, establish and disseminate lessons learned and best practices within the team or for one's future work.

19. Manage relationship with Subject Matter Experts (SMEs), customers, or stakeholders.

- Accommodate customer's or stakeholder's needs, schedule, style, and culture.
- Build and maintain effective relationship with SMEs, customers or stakeholders, including managing difficult SMEs, customers or stakeholders.
- Educate SMEs and customers/vendors/stakeholders.

20. Apply business acumen to build a business case for the organization's instructional programs.

- Understand the overall business process and objectives.
- Write training/business proposals.
- Benchmark other organizations.

Table 9, presented above, reveals four domains of typical job tasks for expert instructional designers in WBI. The first domain is Profession Foundations, and it pertains to six topics:

- Effective communication skills;
- Interpersonal skills;
- Application of research results and theories;
- Continuous improvement of professional knowledge and skills;

- Legal and regulation compliances; and
- Multitasking skills.

The second domain is Planning and Analysis, and it pertains to four topics:

- Needs assessment;
- Learner characteristic analysis;
- Content and task analysis; and
- Technologies and tools analysis.

The third domain is Design and Development, and it pertains to five topics:

- Selecting instructional strategies;
- Design for development;
- Development;
- Evaluation and assessment; and
- Global appropriateness.

The fourth and last domain is Implementation and Management, and it pertains to five topics:

- Delivery and implementation;
- Project management;
- Collaboration;
- Stakeholder management; and
- Business skills.

In Table 9 (see page 50), the first domain Professional Foundations has six competencies and 29 supporting performance statements. The second competency domain Planning and Analysis has four competencies and 14 supporting performance statements, or 15 supporting performance statement, if "[a]sk the right questions to extract information from SMEs and stakeholders" in Professional Foundations supporting "Communicate effectively, in visual, oral, and written formats" competency is considered applicable in this domain supporting the "Conduct task analysis and content analysis" competency. The third domain Design and Development has five competencies and 21 supporting performance statements. The fourth domain Implementation and Management has five competencies and 27 supporting performance statements.

Research Questions 1, 2, and 3 have been answered by the list in Table 9.

The 20 competencies and the supporting 91 performance statements were not listed by any specific order, other than sequenced as they were identified in the interview transcriptions, which do not have any significance. The next section will present findings from data analysis to rank the competencies.

Criticality of Competencies

The 20 competencies were built into an online survey. The purpose of the survey was to invite perceptions on the identified competencies from other instructional designers in WBI. The result would answer Research Question 4: To what extent is the importance of each competency rated.

After three pilots and revisions, the survey was launched on February 27, 2012 at Zoomerang (see Appendix J). Announcements and open invitation were posted in the

evening at ISPI Global, ISPI Michigan Chapter, ASTD National, and eLearning Guild LinkedIn group discussion sites. The criteria of participating in the survey were explained in the Web postings. In additional to the public announcement, emails were sent to two previous interview participants who suggested they knew others who might be interested in participating. Another nine individuals were contacted by emails with the survey link and suggested deadline. Those nine individuals had agreed previously to participate in the research. The reason why they were placed in the survey group was either because they indicated their availability allowed only later involvement, or because they agreed to participate at the time when enough interview participants had already been recruited.

Within the first 24 hours of the survey launch, 7 responses were received. To increase the response rate, a change of strategy took place. The time of the daily discussion digests sent to members from the ten popular LinkedIn groups and the volume of member postings were investigated. It was discovered that the postings announcing this competency research survey at the high traffic LinkedIn group sites were unnoticed by anyone. Timing was the number one reason for this zero exposure. From the hour the announcements were posted at ASTD National, ISPI Global, and eLearning Guild LinkedIn groups in the early evening, to the hour when the daily discussion digests arrived at members' email boxes in the early morning, a good number of other members' new postings appeared to push down the competency research survey announcement and eventually out of the next day's daily discussion digests. To mitigate the competition, a few smaller LinkedIn groups were selected, such as Computer Based Training Professionals Group, Instructional Design & eLearning Professionals Group, Instructional Design & eLearning Performance Solutions Group, Freelance in

Instructional Design & eLearning Industry Group, and Friends of Innovative Learning Group. Another remedy was to submit a second announcement at ASTD national a few minutes prior to the distribution of the daily digest. It won the third place in the ASTD discussion digest of the day, but it was unable to verify the number of participants attracted from each LinkedIn group. By the number of discussion comments posted in the research survey announcement postings, ISPI Michigan Chapter Group and Instructional Design & eLearning Professionals Group attracted more participants than other groups. Additionally, 73 individual messages were sent to ASTD National paid members using the member directory function at the Website. The idea was to try and attract all the members with the senior instructional designer job title and moved on to contact other instructional designers when needed. Zero response was generated from this method in the first 24 hours. After the investigation at the ASTD mediated message, it was discovered that such message was not customized: The message subject appeared the same to everybody as "Contact from ASTD Member Directory", with no font style or paragraph breaks in the message body. To make things worse, the contacting message initiated from ASTD member directory Website was not URL friendly: The survey link was broken, due to space forced into the URL for the text wrap. There was no remedy because ASTD National chose to hide members' emails and therefore any contact had to be sent through a ASTD mediated message board where the researcher had no control of formatting. This method of recruiting ASTD members for survey was therefore aborted. By the end of February 29, 2012, the survey received 27 completed responses. One of the responses received was excluded because the participant explicitly indicated, by writing at the end of the survey, that an error was made: The highest rate was treated as the

lowest, the lowest was treated as highest. By March 3, 2012, 31 completed responses were received, and the survey officially closed. The excluded response was not included in the data analysis. As the result, 30 completed responses were counted toward the survey results.

It was noticed that the Zoomerang survey system had a flaw. Some participants didn't give a rating to all 20 competencies in Question 11. However, their responses were passed as completed responses. This system flaw resulted in less than 30 responses for ten competencies.

In closing, the survey received 70 visits, five partial responses, 31 completed responses, and six system screen-outs which automatically disqualified those who indicated in survey questions 2 and 3 that they did not meet the participating criteria.

The responses from 30 participants were calculated statistically. Table 10 lists the mean and standard deviation of each competency.

Table 10
Ranked 20 Competencies
Confidence Level at 95%

Competency	N	Mean	Median	Std. Dev.	Ranking
Communicate effectively, in visual, oral, and written formats	29	4.69	5	0.54	1
Manage relationship with Subject Matter Experts (SMEs), customers, or stakeholders	29	4.48	5	0.78	2
Determine appropriate instructional strategies and techniques	30	4.47	5	0.9	3
Evaluate and assess the Web-based instruction and its impact	30	4.27	5	0.94	4

Apply research results and instructional theories to the practice of Web-based instructional design	29	4.24	4	0.87	5
Design instructional materials for development	29	4.24	4	0.95	6
Build trust with others by acting positively, respectfully, and diligently	29	4.07	4	0.88	7
Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction	29	4.07	4	0.84	8
Identify and comply with legal, ethical, and regulatory requirements	29	4.07	4	0.75	9
Conduct a needs assessment pertinent to the goals of the Web-based instruction	30	4.07	4	0.94	10
Analyze the characteristics of the target audience	30	4.03	4	1.03	11
Analyze the characteristics of available technologies and tools for the Web-based instruction project	30	4.03	4	0.89	12
Promote efficiency and effectiveness for internal and external collaboration	30	3.97	4	0.85	13
Develop instructional materials	30	3.9	4	1.06	14
Plan and implement assignments and resources to achieve project goals	30	3.9	4	0.84	15
Apply business acumen to build a business case for the organization's instructional programs	29	3.9	4	1.06	16
Conduct task analysis and content analysis	28	3.89	4	0.96	17
Successfully complete multiple tasks and responsibilities	28	3.79	4	0.79	18
Deliver and implement end products	30	3.6	4	1.07	19

Design instruction to be appropriate for global usage	30	3.3	3	1.02	20

Some competencies received varied responses. A few competencies had the same mean. This will be addressed in the next chapter. Overall, the participants responded positively by assigning high ratings to the majority of the competency items using a 1-5 Likert scale, with 1 as being not important, 2 slightly important, 3 important, 4 very important, and 5 most important. Only one out of the 20 competencies received a rating below 3.5, and that was a 3.3 in the "Design instruction to be appropriate for global usage". Sixty percent of the competencies received a rating at or above 4.0. On average, the rating for all competencies was 4.05. Table 11 summarizes the level of support for the competencies in the four domains.

Table 11
Summary of the Level of Support for Competencies by Survey Participants (N=30)

Domain	Rating Range								Total Across Domain	
	4.5-5.0		4.0-4.49		3.5-3.99		3.0-3.49			
	L.S.[a]	%	L.S.	%	L.S.	%	L.S.	%	L.S.	%
Professional Foundations	1	17	4	67	1	17	0	0	6	101
Plan and Analysis	0	0	3	75	1	25	0	0	4	100
Design & Development	0	0	3	60	1	20	1	20	5	100
Implementation & Management	0	0	1	20	4	80	0	0	5	100
Total Across Competencies	1	5	11	55	7	35	1	5	20	100

[a]L.S. = Level of Support

It is difficult to tell which competency domain was more crucial for an instructional designer in WBI to perform at the expert level. It is fair to say that the identified competencies combined across the four domains enabled such instructional

designer to perform at the perceived expert level. Calculation of the weighted average is only an attempt to assess which domain weighed relatively more than the others:

- Professional Foundations: 4.16
- Plan and analysis: 4.00
- Design and Development: 4.04
- Implementation and Management: 3.97

Professional Foundations domain is at the top, and the rest three are very close on average.

To sum up, the top five competencies are:

- Communicate effectively, in visual, oral, and written format.
- Manage relationship with Subject Matter Experts (SMEs), customers, or stakeholders.
- Determine appropriate instructional strategies and techniques.
- Evaluate and assess the Web-based instruction and its impact.
- Apply research results and instructional theories to the practice of Web-based instructional design.

This section focused on the perception of instructional designers in WBI, whether they were experts or not, of the importance of each competency. The next section will discuss whether or not the work environments had any impact on competencies and performance.

Work Environments Impact on Performance

The impact of work environments on competencies and performance is determined by what happened in performance by the very person or persons, and not solely through perception. The data from the interview group were used and therefore its findings were applied.

Business Setting Impact

The distribution of competencies and performance statements by business settings (see Appendix K-1) shows that some of the performance statements were unique in different settings. They are:

Government and Military:

- Ensure the interface is created and compatible with other media elements (Design & Development domain).

Business and Industry:

- Present in meetings (Professional Foundations domain).
- Sell ideas, proposals, or expertise to the management (Professional Foundations domain).
- Set an example by working hard (Professional Foundations domain).
- Update knowledge and skill set by going back to school for formal training (Professional Foundations domain).
- Comply with participating employee's union regulations and policies (Professional Foundations domain).

- Work on multiple projects at a time (Professional Foundations domain).
- Ensure the instructional content is appropriate in language and culture for global audience and translation (Design & Development domain).
- Set up and schedule training sessions (Implementation & Management domain).
- Create project plans (Implementation & Management domain).
- Recruit and allocate human resources (Implementation & Management domain).
- Benchmark other organizations (Implementation & Management domain).

Healthcare:

- Be sensitive to accessibility design (Design & Development domain).

Independent Consultant:

- Keep proprietary information confidential and follow the required procedures (Professional Foundations domain).

The domains that were more likely to be business setting sensitive are the Professional Foundations domain and the Implementation & Management domain. The Plan & Analysis domain was least likely to be business setting sensitive.

Some performance statements were missing in a few business settings. For an easy interpretation, those performance statements were clustered by competencies. The competencies in which all the supporting performance statements were absent are listed below:

Government/Military:

Comp. 5. Identify and comply with legal, ethical, and regulatory requirements (Professional Foundations domain).

Comp. 6. Successfully complete multiple tasks and responsibilities (Professional Foundations domain).

Comp. 15. Design instruction to be appropriate for global usage (Design & Development domain).

Education:

Comp. 5. Identify and comply with legal, ethical, and regulatory requirements (Professional Foundations domain).

Comp. 6. Successfully complete multiple tasks and responsibilities (Professional Foundations domain).

Comp. 8. Analyze the characteristics of the target audience (Planning & Analysis domain).

Comp. 15. Design instruction to be appropriate for global usage (Design & Development domain).

Healthcare:

Comp. 5. Identify and comply with legal, ethical, and regulatory requirements (Professional Foundations domain).

Comp. 6. Successfully complete multiple tasks and responsibilities (Professional Foundations domain).

Comp. 20. Apply business acumen to build a business case for the organization's instructional programs (Implementation & Management domain).

Independent Consultant:

Comp. 15. Design instruction to be appropriate for global usage (Design & Development domain).

Comp. 20. Apply business acumen to build a business case for the organization's instructional programs (Implementation & Management domain).

Table 12 lists the top five performance statements and the top three competencies in each business setting. The numbers in the table indicate the placements in the entire competency list or performance statement list for that specific business setting group. The list was generated by adding up the levels of support of a performance statement or competency from all participants in the group, in descending order. In the case of multiple items having the same accumulated level of support, more than five performance statements or more than three competencies are listed.

Table 12
Top Performance Statement and Competencies by Business Settings
(N=15)

	Top 3 Competencies	Top 5 Performance Statements[a]
Government / Military	1. Plan and implement assignments and resources to achieve project goals. 2. Promote efficiency and effectiveness for internal and external collaboration. 3. Design instructional materials for development.	1. Lead, manage, and coordinate with team members. 2. Develop and utilize testing and review strategies for quality control. 2. Validate content or strategies by formative or summative evaluation or both with sample audience onsite or remotely. 2. Provide operational templates, other technical

		specifications, standards, and repository to achieve efficiency and consistency within the team. 3. Create relevant learning objectives and corresponding instructional strategies. 3. Create storyboards with descriptions for graphics, audio, video, interaction, and simulation, as well as audio scripts. 3. Revise as necessary based on the feedback from customer(s) or sample audience.
Business / Industry	1. Plan and implement assignments and resources to achieve project goals. 2. Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction. 2. Develop instructional materials.	1. Promote and apply instructional principles, theories, and research results to the instructional system design process. 1. Lead, manage, and coordinate with team members. 2. Learn and try out emerging technologies and methodologies, be open minded. 2. Determine appropriate technique, technology, and media to support learning objectives and strategies. 3. Build and maintain effective relationship with SMEs, customers or stakeholders, including managing difficult SMEs, customers or stakeholders.
Education	1. Manage relationship with Subject Matter Experts (SMEs), customers, or stakeholders. 2. Plan and implement assignments and resources to achieve project goals. 3. Communicate effectively, in visual, oral, and written formats.	1. Build and maintain effective relationship with SMEs, customers or stakeholders, including managing difficult SMEs, customers or stakeholders. 2. Accommodate customer's or stakeholder's needs, schedule, style, and culture. 3. Analyze the given data (needs analysis, course requirements, performance analysis, existing content etc.) from customers or stakeholders. 3. Develop and utilize testing and review strategies for quality control. 3. Lead, manage, and coordinate with team members.
Healthcare	1. Determine appropriate instructional strategies and techniques. 2. Communicate effectively, in visual, oral, and written formats. 2. Plan and implement assignments and resources to achieve project goals.	1. Lead, manage, and coordinate with team members. 2. Be creative and innovative. 3. Communicate clearly and effectively in a language understood by developers. 3. Create relevant learning objectives and corresponding instructional strategies. 4. Identify the capabilities of commonly available software and tools. 4. Design and develop appropriate interactivity or instructional activities to allow learners to practice, apply, and engage
Independent Consultant	1. Develop instructional materials. 2. Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction.	1. Produce and edit animation, video and audio Web materials. 2. Do programming or coding with computer languages. 3. Learn and try out emerging technologies and methodologies, be open minded.

	3. Determine appropriate instructional strategies and techniques. 3. Plan and implement assignments and resources to achieve project goals.	3. Design and develop appropriate interactivity or instructional activities to allow learners to practice, apply, and engage. 3. Add interesting and fun elements to the learning experience. 3. Create storyboards with descriptions for graphics, audio, video, interaction, and simulation, as well as audio scripts. 3. Deliver and implement the end product (to the customer) in a format or platform appropriate for the learning and management environment.

[a]A repetition of ranking numbers indicate a tie. This is applicable to the entire table.

Company Size Impact

The next work environment aspect this study examined is the size of the company. Companies with employees less than 100 were treated as small. Companies with employees between 101 and 2500 were treated as medium. Companies with employees above 2500 were treated as large. Below are the performance statements unique in different size companies:

Large Size Companies:

- Sell ideas, proposals, or expertise to the management (Professional Foundations domain).
- Be patient (Professional Foundations domain).
- Set an example by working hard (Professional Foundations domain).
- Update knowledge and skill set by going back to school for formal training (Professional Foundations domain).
- Comply with participating employee's union regulations and policies (Professional Foundations domain).
- Analyze the characteristics of the learning environment (Planning & Analysis domain).
- Conduct focus group to assist task analysis (Planning & Analysis domain).

- Ensure the interface is created and compatible with other media elements (Design & Development domain).
- Run statistic research and analysis on the collected evaluation data (Design & Development domain).
- Recommend other instructional or non-instructional interventions using the evaluation data (Design & Development domain).
- Be sensitive to accessibility design (Design & Development domain).

Medium Size Companies:

- Facilitate training sessions (Implementation & Management domain).
- Recruit and allocate human resources (Implementation & Management domain).

Small Size Companies:

- Keep proprietary information confidential and follow the required procedures (Professional Foundations domain).

On the contrary, some performance statements were not present in two business size companies. The competencies in which the entire set of supporting performance statements was absent are:

Medium Size Companies:

Comp. 5. Identify and comply with legal, ethical, and regulatory requirements (Professional Foundations domain).

Small Size Companies:

Comp. 20. Apply business acumen to build a business case for the organization's instructional programs (Implementation & Management domain).

Table 13 lists the top five performance statements and the top three competencies for each business size. The numbers in the table and the occurrences of ties were handled in the same way as previously.

Table 13
Top Performance Statement and Competencies by Business Sizes
(N=15)

	Top 3 Competencies	Top 5 Performance Statements[a]
Large Size Companies (>2500)	1. Plan and implement assignments and resources to achieve project goals 2. Develop instructional materials. 3. Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction.	1. Lead, manage, and coordinate with team members. 2. Promote and apply instructional principles, theories, and research results to the instructional system design process. 3. Determine appropriate technique, technology, and media to support learning objectives and strategies. 3. Create and edit graphics and other non-multimedia instructional materials. 4. Learn and try out emerging technologies and methodologies, be open minded. 4. Create relevant learning objectives and corresponding instructional strategies.
Medium Size Companies (100-2500)	1. Plan and implement assignments and resources to achieve project goals. 2. Manage relationship with Subject Matter Experts (SMEs), customers, or stakeholders. 3. Communicate effectively, in visual, oral, and written formats.	1. Lead, manage, and coordinate with team members. 2. Build and maintain effective relationship with SMEs, customers or stakeholders, including managing difficult SMEs, customers or stakeholders. 3. Promote and apply instructional principles, theories, and research results to the instructional system design process. 4. Manage time efficiently. 5. Develop and utilize testing and review strategies for quality control. 5. Deliver and implement the end product (to the customer) in a format or platform appropriate for the learning and management environment. 5. Accommodate customer's or stakeholder's needs, schedule, style, and culture.
Small Size Companies	1. Develop instructional materials.	1. Develop and utilize testing and review strategies for quality control.

(<100)	2. Communicate effectively, in visual, oral, and written formats. 2. Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction. 3. Design instructional materials for development.	2. Design and develop appropriate interactivity or instructional activities to allow learners to practice, apply, and engage. 3. Ask the right questions to extract information from SMEs and stakeholders. 3. Create storyboards with descriptions for graphics, audio, video, interaction, and simulation, as well as audio scripts. 3. Revise as necessary based on the feedback from customer(s) or sample audience.

[a]A repetition of ranking numbers indicate a tie. This is applicable to the entire table.

Project Team Size Impact

The third work environment aspect this study investigated is the size of the project team. The team included members who were directly responsible for the production of the project and were billable with the project budget. For example, contracted vendor was counted toward the project team, while the external SMEs were not.

A team with over eight team members for the given project was defined as a large team in this study. A three to seven member project team is a medium team, and a one to two member project team is a small team.

The performance statements unique in different size teams are:

Large Project Team:

- Update knowledge and skill set by going back to school for formal training (Professional Foundations domain).
- Ensure the interface is created and compatible with other media elements (Design & Development domain).
- Recruit and allocate human resources (Implementation & Management domain).

- Write training/business proposals (Implementation & Management domain).

Medium Project Team:

- Set an example by working hard (Professional Foundations domain).
- Comply with participating employee's union regulations and policies (Professional Foundations domain).
- Be sensitive to accessibility design (Design & Development domain)
- Deliver instructions and training synchronously or asynchronously (Implementation & Management domain).
- Benchmark other organizations (Implementation & Management domain).

Small Project Team:

- Keep proprietary information confidential and follow the required procedures (Professional Foundations domain).

The competencies in which the entire set of supporting performance statements was absent in terms of the project team size are:

Large Project Team:

Comp. 5. Identify and comply with legal, ethical, and regulatory requirements (Professional Foundations domain).

Small Project Team:

Comp. 20. Apply business acumen to build a business case for the organization's instructional programs.

This absent list matches the company size absent list. The same extent of matching was not present in the two unique lists. However, the majority items in the unique competency list regarding the project team size also appeared in the unique competency list regarding the company size.

Table 14 displays the top five performance statements and the top three competencies for each business size. The numbers in the table and the occurrences of ties were handled in the same way as previously.

Table 14
Top Performance Statement and Competencies by Project Team Sizes
(N=15)

	Top 3 Competencies	Top 5 Performance Statements[a]
Big Project Team (>=8)	1. Plan and implement assignments and resources to achieve project goals. 2. Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction. 3. Develop instructional materials.	1. Lead, manage, and coordinate with team members. 2. Promote and apply instructional principles, theories, and research results to the instructional system design process. 3. Create efficient workflow and platform for internal and external collaboration. 4. Learn and try out emerging technologies and methodologies, be open minded. 5. Determine appropriate technique, technology, and media to support learning objectives and strategies. 5. Create relevant learning objectives and corresponding instructional strategies. 5. Revise as necessary based on the feedback from customer(s) or sample audience.
Medium Project Team (3-7)	1. Plan and implement assignments and resources to achieve project goals. 2. Communicate effectively, in visual, oral, and written formats. 3. Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction.	1. Lead, manage, and coordinate with team members. 2. Build and maintain effective relationship with SMEs, customers or stakeholders, including managing difficult SMEs, customers or stakeholders. 3. Promote and apply instructional principles, theories, and research results to the instructional system design process. 4. Design and develop appropriate interactivity or instructional activities to allow learners to practice, apply, and engage 5. Manage time efficiently
Small Project	1. Develop instructional materials.	1. Produce and edit animation, video and audio Web materials.

Team (<=2)	2. Plan and implement assignments and resources to achieve project goals. 2. Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction.	2. Create and edit graphics and other non-multimedia instructional materials. 2. Learn and try out emerging technologies and methodologies, be open minded. 3. Work with the combined roles of project manager, instructional designer, instructional developer in a given project. 3. Deliver and implement the end product (to the customer) in a format or platform appropriate for the learning and management environment

[a]A repetition of ranking numbers indicate a tie. This is applicable to the entire table.

This section presented the findings that illustrated the possible impact of work environments on competency and performance. In different company settings, companies of different sizes, and project teams of varied sizes, the expert instructional designers in WBI demonstrated unique behaviors. The performance statements appeared only in certain environment suggests those performance may be dominant in that environment, while the absence of competencies suggests those competencies may be latent in such environment. The lists of top competencies and performance statements were attempted to illustrate the performance characteristics of each work environment.

This section answered research question 5.

The Perception of Future WBI from Expert Instructional Designers

The last research question was about the future of WBI, perceived by the experts in the field, and how the professionals should respond to it. Web-based instruction is a dynamic field. When the name for the field changed, the scope shifted, or a new dimension was added, or a path was revealed. The experts, as a leading role in the profession, must be aware of the dynamics and be prepared for. The information in this section presents what the participants felt was happening or was imminent and their advice for peers and other related professionals.

What Is the Future Like?

The perceptions on future focused on five topics:

- Social media for instruction;
- Mobile learning;
- Cloud learning and collaboration;
- Virtual/Online classrooms; and
- More on-demand and engaging WBI.

The comments by each participant were extracted and simplified in Appendix M.

What Should We Do?

The advices from the interview participants for peers and new graduates are summarized and listed in Appendix N. The most frequently mentioned advices were to:

- Join professional organizations.
- Go to meetings, conferences and events.
- Read extensively and regularly.
- Try out new technologies and tools.

The overall picture predicted by the expert instructional designers in WBI is dynamic. It is therefore challenging for instructional designers to keep pace with the innovations. We would otherwise be left behind, as two participants commented.

CHAPTER 5 DISCUSSION AND CONCLUSIONS

The foremost purpose of this study was to identify the domains, competencies and performance statements present in expert instructional designers in Web-based instruction (WBI) by the use of the IBSTPI model. The IBSTPI model formed the conceptual foundation for the structured interviews. The inquiry of this study was to further probe and discover the order of importance for each competency. A qualitative online survey was conducted to fulfill this second purpose. The above identification, with a different approach of data analysis, yielded another discovery of work environment influence on competencies. It was also of interest of this study to bring up a discussion on the future of Web-based instruction, and on how instructional designers should be prepared in view of the new direction. This chapter discusses conclusions and implications induced from the findings of this study.

Competencies and the Ranking

The structured interview produced a list of 20 competencies, which were subsequently validated and ranked by the online survey. The final list corresponded in many ways with the competency list from the IBSTPI competency study for instructional designers completed in year 2000 (Richey, Fields & Foxon, 2001). Nevertheless, the competency list in this study was distinctive. For example:

- The competency *Communication effectively in visual, oral, and written format* was ranked number one in both lists.

- *Evaluate and assess Web-based instruction and its impact* was ranked number four, while its counterpart competency in the IBSTPI list *Evaluate and assess instruction and its impact* was ranked number five.
- The competency *Identify and comply with legal, ethical, and regulatory requirements* was regarded more important in this study than the same competency in the IBSTPI study, ascending from rank 23 to rank 9 in this study.
- *Conduct a needs assessment pertinent to the goals of Web-based instruction* was regarded less important in this study than the equivalent competency *Conduct a needs assessment* in the IBSTPI study, descending from rank two to rank 10 in this study.
- *Analyze the characteristics of the target audience* was ranked number 11 in both lists.
- *Develop instructional materials* was ranked number 14 in this list versus number three in the IBSTPI list.
- This study also generated two new competencies regarding interpersonal skills: *Manage relationship with Subject Matter Experts (SMEs), customers, or stakeholders* and *Build trust with others by acting positively, respectfully, and diligently*. The latter also carried an attitude aspect. They were ranked number two and seven respectively.
- The last competency *Design instruction to be appropriate for global usage* in this study was not a standalone competency in the IBSTPI study, but rather a supporting performance statement.

Consistent with researches and literature on expert competence (Shanteau, 1992), the insistent competency for all Web-based instructional designers was effective communication skill which is necessary in interactions with team members, clients, and leaders, as well as conveying instructional messages to target audience (Richey, Fields & Foxon, 2001).

Of course, a few competencies in the two lists do not always have the same associations. *Develop instructional materials*, for example, supported in the IBSTPI study by three statements (Richey, Fields & Foxon, 2001), while the same competency in this study was supported by seven statements specifically aligned with Web-based instruction. The fact that the two competency lists differ in many ways is not surprising, because the IBSTPI competencies "speak to generic design issue" (Richey, Fields & Foxon, 2001, p. 40), while the competencies in this study are applicable only to WBI instructional design.

It appeared in this study that the overall instructional design process for Web-based instruction did not differ significantly from the conventional instructor-led instruction. Nine out of 15 interview participants mentioned that the ADDIE model or variations of the ADDIE model were applied. The difference revealed in this study was the amount of efforts and time each instructional system design (ISD) phase was contributed to. The levels of support in Table 11 (see page 61) reflected that the Implementation & Management phase was equally important as the Design & Development phase for the survey participants, and the Planning & Analysis phase was the least important. Similarly, the interview participants on average spent 31.6 percent of effort or time in implementing and managing, 26.6 percent in designing and developing,

26.5 percent in professional foundation skills (namely communication, interpersonal, attitude, professional development). The last and the least was planning and analyzing in which 15.3 percent effort or time was spent. This is contradictory to the traditional ideas about expert instructional designers, where Rowland (1992), Le Maistre (1998), and Perez & Emery (1995) described expert designers as conducting long analysis, carrying out comprehensive front end analysis, or spending more time on analyzing problems. However, such discrepancy is not surprising. It is very much determined by the nature of a training department in an organization or an independent consultant as a stand-alone business serving Web-based instruction needs - many of them were approached with WBI requests by customers, with analysis very much completed. Employing dedicated needs analysis team apart from instructional design team was identified as one of the methodologies to increase instructional design efficiency (Roytek, 2010). The term human performance improvement appeared as a jargon to many employers than a clear application to Web-based instruction designers (Hansen, 2010). Another reason for the weakened analysis was the unwillingness to invest money and time by the customers or stakeholders on this step. "Knowledge of the analysis and evaluation stages of instructional technology are very important for business and industry; however, research shows that these are often the stages of the ID model that are skipped when there are shortage of time or money" (Larson, 2004, p. 34). Consequently, there were fewer opportunities for instructional designers in WBI, novices or experts, to do an extensive analysis, except analyzing the content, target audience, and tools. Sometimes those could also be given, or pre-determined by the budget. For instance, survey participant number nine reported at the end of the survey, "In my situation, the tool for Web-based

instruction has already been selected. There is minimum opportunity to analyze other options."

Another defining feature of WBI is its Web nature. As interview participant 010 commented:

> …Web is global, period. Web is not regional. So Web and global are synonymous. And if you've got a global issue, it's a Web issue. So we were working through things like global English, that was not just happening in UFO, that was a major focus for us, that were tasks happening all over the world. And understanding how all of this have been communicated. We had those aspects as well…(lines 227-342, Transcription for Interview 010).

It is thus indispensable, not unexpected, to have a separate competency to reflect this global aspect. "The interest in recent years on the interaction between culture and educational technology is growing" (Rogers, 2007, p. 198).

Environment Impact on Competencies and Performance

The 20 competencies ranked in Table 10 (see page 59) revealed that five competencies had a standard deviation larger than one. The rest were below one standard deviation. It indicated that the opinions of the participants in the survey were not dispersed; however, a few of them were slightly more varied from the mean than the rest. Errors made by some participants could be counted partially for the variability, such as the self-reported survey participant who mis-read the instructions and thus was excluded from the data analysis. Another source for the variability could be stemmed from varied opinions due to the impact of work environments, as discovered in findings presented in Chapter 4.

It is unclear the extent of the impact of the work environment has on competencies and their performance statements, because the participants were not equally

selected from each work environment. However, it is clear that the different work environment had an impact.

The findings by business settings revealed a substantially less impact on competencies and performance statements than the findings by company sizes and by project team sizes. The expert WBI instructional designers from both large size companies and medium size companies seemed to have contributed the most efforts or time on the project management related competency *Plan and implement assignments and resources to achieve project goals*. At the performance level, the statement *Lead, manage, and coordinate with team members* was at the top in both types of companies. At the domain level, the Implementation & Management domain had the highest level of support for both types of companies. In contrast, expert WBI instructional designers from small size companies appeared to have paid the most efforts or time to develop instructional materials. More specifically, they were more focused on developing the testing and review strategies, and in designing and developing interactivities than other expert WBI instructional designers. Consequently their number one strength lay in the Design & Development domain. Interestingly, expert WBI instructional designers from large size companies were also very strong in the Design & Development domain, with *Develop instructional material* as their second top competency. Lastly, expert WBI instructional designers in medium size companies and small size companies shared the communication skills as the third and second competency respectively.

Looking at the impact of project team sizes on competencies and performance statements, it was not difficult to notice a similar pattern. At the domain level, expert WBI instructional designers working on big project teams and medium project teams

demonstrated strength in the Implementation & Management domain, while those working on small project teams were strongest in the Design & Development domain. This matches the impact of company size when domains are regarded. At the competency level, project team sizes showed no significant differences of its impact - project management skills were equally strong among the expert WBI instructional designers working on three types of teams. *Develop instructional materials* was another strong competency for expert WBI instructional designers on both big and small project teams. Communication skills appeared to be more dominating among the expert WBI instructional designers on medium project teams than on other two teams. At the performance statement level, team management skill, theoretical foundation on instructional design process, and collaboration were the most observed behaviors in the expert WBI instructional designers functioning on big project teams. Similarly, team management skill, interpersonal skills, and theoretical foundation on instructional design process weighted most among those on the medium project teams. For the small project teams, development skills including creating animated or multimedia materials, non-interactive materials (that is, text and graphics), and constantly learning new tools were highly critical. A noteworthy performance for the expert WBI instructional designers on small project teams was the presence of multiple functional roles in a given project. More often they had to become project manager, instructional designer, and developer simultaneously when compared to the instructional designers on big or medium teams.

It was noticed in this study that WBI instructional designers from large companies do not always have a big team to work with, and small companies do not always have a small team for WBI projects as well. It is safe to state, nevertheless, according to the

findings discussed above, that expert instructional designers in large size companies or big teams must demonstrate strong competencies in team and project management, because they are more likely to interact with people from other teams, or to be the leaders of the WBI projects. Another challenge for expert instructional designers on big teams is that the scope of a WBI project can become very large, and the complexity of technology and involvement of many developers require the lead instructional designer to be very strong in managing development, such as coordinating collaboration, determining right development strategies (Thach, 1994; Simon, 2003). For an instructional designer who is to complete a WBI project all by herself or himself, or by two people, their development competencies have to be equally strong, if not stronger than other competencies, because they are solo performers or generalists (Lori, 2000) who have to wear many hats and wear them well in order to "survive and prosper" (p. 1).

Implications of the Study

One of the significance of this study is to help instructional design professionals and organizations who are interested in WBI to grow in the long run. Current instructional design programs can also take advantage of the results for program design to better meet individual needs and organizational expectations for their graduates.

Implication for Individuals

Instructional designers grow their professional skills and competencies in two ways: Formal education and continuous improvement (Tennyson, 2001; Larson, 2004; Hansen, 2010). Education and experience are the two sides of a scale, with the experience being heavier because it is an attribute possessed by experts and distinguishing them from novices and apprentices (Tennyson, 2001). A few interview participants admitted that

they learned almost everything on the job. It is also a fact that over 66 percent survey participants and over 93 percent interview participants earned a degree at or above Master's. Whether the formal education was intended for the credential purpose (Hart, 2008), or for interacting with other professionals at the same professional level (line 43, Transcription for Interview 010), or to acquire knowledge on related learning theories and research skills (Larson, 2004), it has becoming a trend for instructional designers in WBI to have a Master's degree in a major related to instructional design.

Other than obtaining education through academic programs, individual WBI instructional designers can also self-assess their existing competencies against the new standards and competencies defined in the profession as a means of "professional development planning guide" (Richey et al., 2001, p. 93). It is necessary to fill the gap by taking formal trainings such as workshops, seminars, certification programs, or by informal learning such as self-teaching and trying on their own, or learning from peers in professional presentations and discussion. This is "a lifetime effort" (Tennyson, 2001, p. 359). By definition, expert instructional designers in WBI should never stop improving and expanding their knowledge, skills and attitudes about innovative instructional ideas, Web capabilities, tools, models, and limitations. It is crucial to immerse themselves in learning emerging technologies in order to design effective learning programs for new generations (ASTD, 2010). As recommended by many experts in the study, instructional designers in WBI should join one or two professional organizations and network with other professionals. Reading publications extensively and regularly in print or online is part of the continuous improvement efforts. It is not about whether there is available

time; it is about if and when an expert instructional designer in WBI wants to be left behind, as a couple of interview participants asserted.

The Web technology upgrades rapidly. For example, the popularity of smart phones and tablets brought up a brand new instructional topic: Mobile Learning, or mLearning which was unthinkable two years ago (Galagan, 2012). The instructional designers in WBI should update their competencies as frequent whenever the WBI field undergoes a significant change. Self-assessment and continuous improvement are two doors to that path (Tennyson, 2001). Learning and improving, formally and informally, and being open minded are the keys to those doors. It is not hard to recognize that an expert stops being an expert the day he or she stops meeting required competencies.

Implication for Organizations

Some organizations use competency modeling to recruit talent (Rothwell, 1999; Teodorescu, 2004; Yoon & Lim, 2010). Organizations "[d]esign hiring profile and performance assessments to gauge competence levels before hiring" (Teodorescu, 2004, p. 11). In the case of hiring an expert instructional designer in WBI, a senior level instructional designer is usually desired. The names for those positions vary from Senior Instructional Designer to Senior eLearning Instructional Designer to eLearning Technologist, and so on. The job descriptions and qualifications differ to a greater extent than the job titles. It is often noticed that different sets of competencies have been sought after by different organizations (Hansen, 2010). It is, in a way, a proof that competencies are environment sensitive (Larson, 2004). On the other hand, the variations in competency requirements suggest a lack of standards in determining professional competencies. Recruiting expert instructional designer for WBI is no exception. The 20

competencies identified in this study can be applied to determine the core competencies across all work environments, although they are more applicable to the business and industry environment. The performance statements can be used to define the job, or assist in developing professional improvement opportunities (Yoon & Lim, 2010). The trend of increased demand for domain specific or environment specific knowledge by organizations in recruiting instructional designers cannot be explained by this study. However, it is believed that corporate recruiting can take a more strategic approach (Hansen, 2010).

Other than talent recruiting, the identified competencies can also be useful for employee career development, and rewards and compensation determination (Marrelli, 1998). True experts in WBI are hard to come by and are not easily retained. Moreover, novices and other instructional designers in WBI should be encouraged to grow and to reach the next level of expertise. To make both happen, it is essential to have a system in place for professional development and recognition. A good example would be defining and sharing the skill sets or competency requirements for each level of a job (Bozarth, 2012), so that instructional designers or would-be instructional designers in WBI have measureable and achievable objectives if their career goal is to work in the WBI field or to be experts in the WBI field. The rewarding and compensation system can be created in the same manner. It is important to keep in mind that the competencies are more than about skills, they are also related to knowledge and attitude. Measuring and evaluating the right competencies is the key to the success of such systems. In addition, knowledge, skills, and attitude can evolve and shift over time; reaching the highest possible expert level in a particular position does not suggest it is a one-time effort. In other words,

maintaining a level of expertise implies constant updating (Tennyson, 2001). The professional development, recognition, and reward system should incorporate this on-going component into the systems.

Organizations can move one step further to support professional development: Encourage and sponsor professional development activities within and beyond workplace. It may give the impression that this is a zero to little return on investment. However, as expressed by the interview participants in the study, the expert instructional designers in WBI have a passion for communicating with peers in and out of the organizations, and they have the need to stay up-to-dated and get involved in other professional activities. Supporting and sponsoring social learning from the management level can be very beneficial to both the organization and employees (ASTD, 2010). The appreciation of the employees can also be turned into loyalty and therefore become part of retention strategy. Most of all, the information and passion the experts acquired and got enhanced outside workplace can be applied back to instructional and training design in the organizations.

Competencies and performance statements can be put into creative use in an organization in numerous ways. Building employee profiles that include skill inventories, for example, provides opportunities for employees to link with others who have skills they lack (Bozarth, 2012). Granting access to experts or expertise enables cross functional resource sharing, which also accommodates the "[w]atch for opportunities that training and development may be missing" (Bozarth, 2012, p. 67).

Implication for Educators

Higher education institutions play a key role in preparing graduates for workforce (Larson, 2004). Having program curricula that match the current job market needs is

crucial for the success of a program and its graduates (Larson, 2005). An interview participant complained, "When I got out of school I was at a disadvantage because the only thing we learned was Dreamweaver, and then when I entered the workforce nobody was using Dreamweaver" (lines 579-582, Transcription of Interview 016). She asked to be trained with a spectrum of tools and skills. Interview participant 007 strongly recommended to introduce business process into curricula, "[T]he instructional designer should have an introduction to business processes. It's part of the core curriculum if they are planning in going into business. Yeah, I think now you're going to have an introduction to Six Sigma, you have an introduction to QA, you ought to have an introduction on how to design a business process" (lines 275-279, Transcription of Interview 007).

Larson (2004) raised a topic on whether it is more preferred to have a generalist academic program, career environment specific program, or a flexible program allowing students to choose the hours of coursework. The results showed that the generalist programs received higher rating than career environment specific program. On the other hand, another set of data indicated that most instructional design practitioners felt "less prepared for the contextual elements of the subject matter and competencies related to their career environment" (Larson, 2004, p. 192).

While further research on this has been called for, the job market is increasingly seeking environment specific instructional design knowledge and skills in the candidates. Some may even believe that knowledge and skills on proprietary systems and programs are expected. It is not the intent of this study to debate whether such expectations are reasonable, but the instructional technology program in higher education institutions can

take some of the messages from job market into consideration when modifying program curricula, to better prepare their instructional technology graduates for the constant changing Web-based instruction field (Hansen, 2010).

To have a good and continuous number of competent expert instructional designers in WBI, it is truly a joint effort of individuals, organizations, and educating institutes (Moller et al, 2008). WBI, as its new name eLearning has drawn the picture for us, is shifting the perspective from teaching to learning. With the empowering Web technologies and capacity, it is imperative for every one of us to embrace changes.

Limitations of the Study

This study used both quantitative and qualitative research methods to identify and rank competencies demonstrated by expert instructional designers in WBI. One of the limitations of this study was that the sample was not randomly selected for the interview group nor for the survey group. Close screening was required for the interview group to ensure that all participants met the criteria. About half of the participants of the survey group were self-selected, another half were approached by the researcher, due to the limited access to sufficient sample within the limited timeframe. The second limitation is the relatively small sample size, especially for the survey group. The accuracy of the competency ranking might therefore be compromised. The third limitation is the possible presence of bias. The five criteria for interview participants were specified by the researcher, following suggestions from related literature, and therefore the findings based on the interviews of those participants may be representative of only expert instructional designers in WBI meeting these potentially biased criteria. The ability to generalize the findings to other population has been limited.

Recommendations for Further Research

Since WBI is changing at a faster pace, a repeated study should be initiated every five years to closely monitor the changes in competencies and performance statements for expert instructional designers in WBI. It is not impossible that the Web-based instruction field will be re-defined in the near future. A new study would then be desired sooner.

One area for further research is to seek perception from a much larger sample of experts as well as non-expert practitioners in WBI. A more thorough investigation of the work environment impact on competencies and performance statements could be achieved by collecting information from participants from an even distribution in each work environment. Another recommendation for further research is to extend this study by comparing the discrepancies between what competencies expert instructional designers in WBI are demonstrating and what competencies are demanded in the job postings. Lastly, capturing perception from other WBI related professionals, such as SMEs, instructional developers, learning or training managers, and educators might supplement what expert instructional designers have shown and perceived.

Conclusions

From the qualitative and quantitative analysis of the findings, this study has answered six research questions:

Research question 1. What are the domains in which expert instructional designers in WBI function?

Professional Foundations, Planning & Analysis, Design & Development, and Implementation & Management are the four domains identified in IBSTPI study and have been confirmed applicable in this study.

Research question 2. What are the competencies that expert instructional designers in WBI demonstrate?

After analyzing 15 interviews of expert instructional designers in WBI, 20 competencies have been identified. They include: Communicate effectively, in visual, oral, and written formats; build trust with others by acting positively, respectfully, and diligently; apply research results and instructional theories to the practice of web based instructional design; update and improve professional knowledge, skills, and attitudes pertaining to web based instruction; identify and comply with legal, ethical, and regulatory requirements. The complete list and ranking can be found in Table 9, page 50.

Research question 3. What performance statements support each competency of expert instructional designers in WBI?

The interview data yielded 91 performance statements to support 20 competencies in four domains. They include: Analyze the given data (needs analysis, course requirements, performance analysis, existing content, etc.) from customers or stakeholders; create relevant learning objectives and corresponding instructional strategies; ensure the interface is created and compatible with other media elements; develop and utilize testing and review strategies for quality control; create storyboards with descriptions for graphics, audio, video, interaction, and simulation, as well as audio scripts. The complete list of performance statements can be found in Table 9, page 50.

Research question 4. To what extent is the importance of each competency rated?

The competencies have been rated with a choice from 1 to 5 by 30 participants in an online survey. The calculation of means generated a ranked competency list, found in Table 9, page 50. Communication skills, managing relationship with customers,

determining instructional strategies and techniques, evaluating and assessing the Web-based instruction and its impact, applying research results and instructional theories to the practice of Web-based instructional design are the top five competencies.

Research question 5. To what extent does the work environment impact competencies and performance statements?

The appearance and disappearance of competencies and performance statement in the interview group have been analyzed and compared against five business settings, three different company sizes, and three project team sizes. It was discovered that business settings imposed a less significant impact than company sizes and project team sizes on competencies and performance statements. Some competencies and performance statements were uniquely present in specific work environment, while some others were not present at all in particular work environment. The most demonstrated competencies and performance statements in the interview group revealed different patterns for different work environments. Overall, the bigger a company or instructional project team was, the more team and project management skills were demonstrated by the WBI experts. The WBI expert instructional designers working in big size companies exhibited development skills as strong as those working on small project teams. The difference was the WBI experts in big companies had to handle more collaboration and strategies determination for development, and the WBI experts on small teams had to take hands-on production themselves. In other words, it is more demanding of WBI expert instructional designers on small project teams as they have to take more responsibilities.

Research question 6. What direction do expert designers anticipate for WBI that may impact practitioners in WBI?

Expert instructional designers in WBI predicted five trends: Social media for instruction, mobile learning, cloud learning and collaboration, virtual or online classrooms, and more on-demand and engaging WBI. To prepare for these changes, instructional designers in WBI should not only actively speculate on how they can use for Web-based instruction, but also participate in discussions and other professional events to gain more insights and reflections. Experimenting with emerging tools and techniques is of equal importance. It is crucial for expert instructional designers in WBI to be passionate in learning new ideas and embracing innovations.

APPENDIX A COMPETENCY STUDIES BY CAREER ENVIRONMENTS

Competency study	Title and findings
Atchison (1996)	*Roles and competencies of instructional design as identified by expert instructional designers.* This PhD study utilized the critical incident technique in a case study and interviewed 15 expert instructional designers in an effort to gain new understanding about the nature of ID work. Atchison identified nine role themes of reflector, ethicist, humanist, collaborator, advocate, evaluator, manager, marketer, and entrepreneur, and hypothesized that the role of context may provide an initial understanding of how environment shapes expert performance. Limitations: small sample size, selection of experts based on professional organization membership rather than through evaluation of expert status.
Barnum (1979)	*An analysis of instructional systems design as reflected in formal education, industry, and military institutions: Theory vs. application.* PhD study comparing the theoretical design model construct used in academia with the applied ISD model used in training or industrial environments. Found that minor differences between education and military were due to the military's task and skill-oriented approach, and that the academic model could be improved through exchange with the pragmatic training model.
Berge, et al. (2002)	*The increasing scope of training and development competency.* An extensive review of the literature on competencies aimed at showing trends in training & development over the last three decades. Most apparent changes: shift to performance improvement and use of technology.
Branch, Moore, & Sherman (1988)	*Evaluating potential instructional technology and design professionals for academic and business settings: Criteria for decision-making.* An article reporting the results of a survey of members of AECT and NSPI to determine whether business and academic employers used different criteria when hiring. Concluded that distinct business and academic markets exist for IDT graduates and it may be necessary to design curricula and coordinate experiences that specifically prepare students for each market.
Byun (2000)	*Identifying job types and competencies for instructional technologists: A five-year analysis.* PhD study that analyzed emailed job postings sent to an IT department over a 5-year period. Prominent skills for business settings: IDD skills, communications, management, computer application skills; for educational settings: media skills and teaching/delivery skills; for non-profit/government/military settings: evaluation skills. Trends noted: increased demand for Web/online experience, media application skills as opposed to computer application skills, and communication and interpersonal skills.
Cecere (1983)	*A comparative study of media production practices in higher education and business/industry.* PhD study comparing exemplary practices in media production facilities in business & industry with those in academia. Using an alpha-type external needs assessment, his comparison determined significance for planning academic program curricula.

Heideman (1991)	*A forecast of the competencies required for effective performance by instructional technology practitioners in the year 2000.* PhD study that surveyed IT practitioners from business and academia to forecast potential competencies required in the year 2000. Found no significant difference in the perceptions of the two groups and recommended that IT educators emphasize competency selection and application in the curriculum in addition to IDT task performance.
Kapp (1997)	Measuring training competencies using the analytic hierarchy process. PhD study which developed a hierarchy instrument to measure competencies and supporting behavioral skills needed to "excellently" deliver a training message in a corporate setting; can be used to develop a trainer curriculum.
Moyer (1993)	A comparative study of entry-level competencies for educational communications and technology personnel. A PhD study that surveyed faculty and practitioners on the competency requirements across settings found no significant difference between the perceptions of academics and practitioners. Limitations: lack of diversity in population of his questionnaire review panel, & questionable suitability of sample used in the alpha needs assessment.
Piskurich & Sanders (1998)	ASTD models for learning technologies: Roles, competencies, and outputs. An ASTD manual resulting from competency studies in business and industry. Contains a self-assessment instrument.
Stolovitch, et al. (1995)	Skill sets for the human performance technologist. Article recommending HPT skill guidelines be gleaned from sources such as current practice observation, the literature, professional societies, recognized practitioners, and knowledgeable clients. Presents suggested basic and advanced skills, future skill needs and suggestions for academic programs.
Trimby (1982)	Entry level competencies for team members and supervisors/managers on instructional development teams in business and industry. PhD study to identify IDT competencies for business and industry. Surveyed supervisors/managers and found that highest-ranking competencies dealt with interpersonal communication skills (effective listening, attitude formation, adapting to change, establishing credibility with a group); includes recommendations for preparation programs including the study of competency areas rather than individual competencies.

APPENDIX B STRUCTURED INTERVIEW QUESTIONS

1. Good Morning/Afternoon/Evening, thanks for taking time with me. Can you tell me your current job title?
2. How long have you been working in the current position?
3. What's your age range: 25-35, 36-45, 46-55, and 56 above?
4. Would you say you are actively involved in instructional design?
5. Are there any other positions have you held before, that were related with instructional design?
6. How many years accumulatively do you estimate you have worked in design/development for WBI?
7. In those WBI projects, how many years accumulatively do you estimate have served as a lead instruction designer/developer?
8. Describe your education background.
    a. What's the major of your bachelor's degree
    b. Did you have postgraduate education: Master's, or Ph.D.?
    c. Have you had any other training on instructional design?
9. What's the business nature of your current organization: business/industry, education, government/military, health care, multiple setting, other?
10. What's the estimated size of the organization you are working for?
11. Can you tell me a Web Based Instruction project you are very proud of or got highly recognized? (Can you tell me a Web Based Instruction project that you think you learned a lot? Repeat question 11 to 14 in necessary)
    a. How many team members in the project?

b. How long did it last?

c. What was the project about, was it about how to complete a step, process, use systems, or how to perform physical jobs, or change attitude/value?

d. In the next few questions, I am going to ask you about the processes, steps and tasks you went through from very beginning to the end of the project

    i. Describe the project in a very high level (the process by stages)

    ii. Describe the project in as much low level (steps, tasks) as possible

    iii. What event/communication marked the beginning of the project?

    iv. What event/communication indicated the completion of the project?

    v. What was your role in the project?

    vi. What software and services were used?

    vii. What hardware and devices were used?

e. What were the outstanding features of this project?

f. Did it occur to you that you wish to have done the project differently? (Or any challenge during the project?) How differently? (What were the challenges?)

g. What were the solution(s) to the challenge(s)?

12. With the above mentioned project in mind, I am going to task you about what you used to accomplish the project:

    a. What specific knowledge, concepts, and ideas that helped you?

    b. What soft skills did you use?

    c. What hard skills did you use?

   d. What attitude did you realize that was helpful for the success of this project?

13. Which year was the project? What do you wish to have known that you didn't know back then?
14. What are the other knowledge, skills or attitude which were not used in the above project but you used in other Web Based Instruction projects you led?
15. Assuming you are hiring a person as a beginning instructional designer in Web Based Instruction, what skills are you expecting?
16. Assuming you are hiring a person as an experienced instructional designer in Web Based Instruction, what skills are you expecting?
17. Which direction do you see Web Based Instruction is heading to?
18. What do you think an instructional designer should do in order to keep up with this direction?
19. Anything else that was not covered in our conversation but you think is important?

APPENDIX C NOTICE OF EXPEDITED APPROVAL

WAYNE STATE UNIVERSITY

IRB Administration Office
87 East Canfield, Second Floor
Detroit, Michigan 48201
Phone: (313) 577-1628
FAX: (313) 993-7122
http://irb.wayne.edu

NOTICE OF EXPEDITED APPROVAL

To: Yonghui Chen
Administration & Organization Stud
From: Dr. Scott Millis
Chairperson, Behavioral Institutional Review Board (B3)
Date: November 17, 2011
RE: IRB #: 06430983E(R)
Protocol Title: Competencies of Expert Web-Based Instruction Designers
Funding Source:
Protocol #: 1111010288
Expiration Date: November 16, 2012
Risk Level / Category: Research not involving greater than minimal risk

The above-referenced protocol and items listed below (if applicable) were **APPROVED** following *Expedited Review* Category (#7)* by the Chairperson/designee *for* the Wayne State University Institutional Review Board (B3) for the period of 11/17/2011 through 11/16/2012. This approval does not replace any departmental or other approvals that may be required.

- Revised Protocol Summary Form (received in the IRB Office 11/15/2011)
- Protocol (received in the IRB Office 10/21/2011)
- Behavioral Research Informed Consent for Online Survey (dated 09/30/2011)

- Federal regulations require that all research be reviewed at least annually. You *may* receive a *"Continuation Renewal Reminder"* approximately two months prior to the expiration date; however, it is the Principal Investigator's responsibility to obtain review and continued approval ***before*** the expiration date. Data collected during a period of lapsed approval is unapproved research and can never be reported or published as research data.
- All changes or amendments to the above-referenced protocol require review and approval by the IRB **BEFORE** implementation.
- Adverse Reactions/Unexpected Events (AR/UE) must be submitted on the appropriate form within the timeframe specified in the IRB Administration Office Policy (http://www.irb.wayne.edu//policies-human-research.php).

NOTE:

1. Upon notification of an impending regulatory site visit, hold notification, and/or external audit the IRB Administration Office must be contacted immediately.
2. Forms should be downloaded from the IRB website at **each** use.

*Based on the Expedited Review List, revised November 1998

APPENDIX D [BEHAVIORAL] RESEARCH INFORMED CONSENT

Title of Study: Competencies of Expert Web-Based Instruction Designers

Principal Investigator (PI): Yonghui Chen
Instructional Technology, Education, WSU
248-935-7946

Purpose

You are being asked to be in a research study of identifying the competencies possessed by expert Web Based Instruction designers because you have met the five criteria and agreed to voluntarily participate in the study. This study is being conducted at a non-secured location mutually agreed upon by the participant and the principal investigator. The estimated number of study participants for the interview is about 15 as well as about another 30 for the online survey throughout U.S.A. This consent form is for the interview. **Please read this form and ask any questions you may have before agreeing to be in the study.**

In this research study, the researcher is to identify and rate the competencies for expert instructional designers who specialize in WBI. It is one of the hopes of this study to identify the relationships between a top quality Web-based instructional product and the high-level knowledge, skills and attitudes required to produce such a product.

Study Procedures

If you agree to take part in this research study, you will be asked to participate in one, approximately one-hour structured interview. This interview can happen face-to-face or via the web platform as you select. During this interview, you will be asked questions concerning your instructional skills and experience. With your permission, the interview will be audio recorded in digital. The recordings will be transcribed and recorded files and transcriptions will be securely stored until analysis is completed, at which time both recordings and transcriptions will be destroyed.

1. The process started with emails or phone calls to answer any of your questions or concerns. Once the eligibility and volunteering have been established, the contacts (by either email or phone call) has been undertaken to determine a convenience location, time and platform. You should have received the structured interview questions in email before the interview, to allow preparation and thinking.
2. The interview visit will last about one hour, in one session. If this one session has to be broken up due to emergency or other urgent needs, another interview session will be discussed and determined by both parties, until all of the

interview questions are answered. A follow-up contact is little likely, but not impossible, to clarify some answers of yours in the interview.

3. Some demographic questions will be asked. The majority questions are about the experience in your Web Based Instruction field. You may choose not to answer some of the questions if you don't feel comfortable and still be able to remain in the study.
4. Your identify will be protected, without releasing your participation to any other individuals or organizations. A pseudo name or code will be used to identify you in the study.

Benefits

As a participant in this research study, there *will* be no direct benefit for you; however, information from this study may benefit other people now or in the future.

Risks

There are no known risks at this time to participation in this study.

Alternatives

There is no treatment or invention in this study.

Study Costs

- Participation in this study will be of no cost to you.
- You will be paying gas yourself to the interview location, when necessary.

Compensation

You will not be paid for taking part in this study.

Confidentiality

All information collected about you during the course of this study will be kept confidential to the extent permitted by law. You will be identified in the research records by a code name or number. Information that identifies you personally will not be released without your written permission. However, the study sponsor, the Institutional Review Board (IRB) at Wayne State University, or federal agencies with appropriate regulatory oversight [e.g., Food and Drug Administration (FDA), Office for Human Research Protections (OHRP), Office of Civil Rights (OCR), etc.) may review your records.

When the results of this research are published or discussed in conferences, no information will be included that would reveal your identity.

The audio recordings of you will be used only for this research. After the study is completed, those digital recordings, transcriptions and any other documents directly related with you will be destroyed. You have the right to review the recording and transcriptions before the destroying action. The principal investigator (i.e. the interview conductor) is the only one who will have access to the identifiable information. Your personal identity will not be mentioned by the principal investigator during the recording, and you are asked not to mention full names of yours, your employer and other individuals, because the recordings may be sent to professionals for transcription.

Voluntary Participation/Withdrawal

Taking part in this study is voluntary. You have the right to choose not to take part in this study. If you decide to take part in the study you can later change your mind and withdraw from the study.] You are free to only answer questions that you want to answer. You are free to withdraw from participation in this study at any time. Your decisions will not change any present or future relationship with Wayne State University or its affiliates, or other services you are entitled to receive.

The PI may stop your participation in this study without your consent. The PI will make the decision and let you know if it is not possible for you to continue. The decision that is made is to protect your health and safety, or because you did not follow the instructions to take part in the study

Questions

If you have any questions about this study now or in the future, you may contact Yonghui Chen or one of her research advisors at the following phone number 248-935-7946 or 313-577-1728. If you have questions or concerns about your rights as a research participant, the Chair of the Institutional Review Board can be contacted at (313) 577-1628. If you are unable to contact the research staff, or if you want to talk to someone other than the research staff, you may also call (313) 577-1628 to ask questions or voice concerns or complaints.

Consent to Participate in a Research Study

To voluntarily agree to take part in this study, you must sign on the line below. If you choose to take part in this study you may withdraw at any time. You are not giving up any of your legal rights by signing this form. Your signature below indicates that you have read, or had read to you, this entire consent form, including the risks and benefits, and have had all of your questions answered. You will be given a copy of this consent form.

_____	_____
Signature of participant /	Date
_____	_____
Printed name of participant /	Time
_____	_____
Signature of person obtaining consent	Date
_____	_____
Printed name of person obtaining consent	Time

APPENDIX E [BEHAVIORAL] RESEARCH INFORMED CONSENT

Title of Study: Competencies of Expert Web-Based Instruction Designers

Principal Investigator (PI): Yonghui Chen
Instructional Technology, Education, WSU
248-935-7946

Purpose

You are being asked to be in a research study of scaling the competencies possessed by expert Web Based Instruction designers because you have met the five criteria and agreed to voluntarily participate in the study. The estimated number of study participants for the interview is about 15 and about 30 for the online survey. This information sheet is for the online survey. **Please read this form and ask any questions you may have before agreeing to be in the study.**

In this research study, the researcher is to identify and rate the competencies for expert instructional designers who specialize in WBI. It is one of the hopes of this study to identify the relationships between a top quality Web-based instructional product and the high-level knowledge, skills and attitudes required to produce such a product.

Study Procedures

If you take part in the study, you will be asked with questions concerning your opinions on instructional competencies. The survey will be anonymous, unless you are willingly to give your names and other personal information. The list of survey participants will be stored securely until analysis is completed, at which time the list will be destroyed.

- You will be asked to rate the importance and frequency of each listed competencies. Those competencies have been compiled out of the preceding interview results.
- You are encouraged to answer all questions. However, you the option of not answering some of the questions and remaining in the study.
- It will take approximately 15 minutes to complete the survey.

Benefits

As a participant in this research study, there *will* be no direct benefit for you; however, information from this study may benefit other people and society now or in the future.

Risks

There are no known risks at this time to participation in this study.

Study Costs

- Participation in this study will be of no cost to you.

Compensation

You will not be paid for taking part in this study.

Confidentiality

All information collected about you during the course of this study will be kept confidential to the extent permitted by law. You will be identified in the research records by a code name or number. Information that identifies you personally will not be released without your written permission. However, the study sponsor, the Institutional Review Board (IRB) at Wayne State University, or federal agencies with appropriate regulatory oversight [e.g., Food and Drug Administration (FDA), Office for Human Research Protections (OHRP), Office of Civil Rights (OCR), etc.) may review your records.

When the results of this research are published or discussed in conferences, no information will be included that would reveal your identity.

You will be identified in the research records by a code name or number, if you choose to identify yourself during the survey.

Voluntary Participation/Withdrawal

Taking part in this study is voluntary. You have the right to choose not to take part in this study. If you decide to take part in the study you can later change your mind and withdraw from the study. You are free to only answer questions that you want to answer. You are free to withdraw from participation in this study at any time. Your decisions will not change any present or future relationship with Wayne State University or its affiliates, or other services you are entitled to receive.

The PI may stop your participation in this study without your consent. The PI will make the decision and let you know if it is not possible for you to continue. The decision that is made is to protect your health and safety, or because you did not follow the instructions to take part in the study

Questions

If you have any questions about this study now or in the future, you may contact Yonghui Chen or one of her research advisors at the following phone number 248-935-7946 or 313-577- 1700. If you have questions or concerns about your rights as a research participant, the Chair of the Human Investigation Committee can be contacted at (313) 577-1628. If you are unable to contact the research staff, or if you want to talk to someone other than the research staff, you may also call (313) 577-1628 to ask questions or voice concerns or complaints.

Consent to Participate in a Research Study

To voluntarily agree to take part in this study, you must sign on the line below. If you choose to take part in this study you may withdraw at any time. You are not giving up any of your legal rights by signing this form. Your signature below indicates that you have read, or had read to you, this entire consent form, including the risks and benefits, and have had all of your questions answered. You will be given a copy of this consent form.

_____	_____
Signature of participant	Date
_____	_____
Printed name of participant	Time
_____	_____
Signature of person obtaining consent	Date
_____	_____
Printed name of person obtaining consent	Time

APPENDIX F INTERVIEW TRANSCRIPTIONS

Transcription of Interview 001

Q1	Good Evening, thanks for taking time with me. Can you tell me your current job title?
A1	Principal instructional designer
Q2	How long have you been working in the current position?
A2	As the principal, two years. Before that, I had been instructional designer for 19 years.
Q3	What's your age range: 25-35, 36-45, 46-55, and 56 above?
A3	36-45
Q4	Would you say you are actively involved in instructional design?
A4	Yes
Q5	Are there any other positions have you held before, that were related with instructional design?
A5	I was a senior instructional designer and a senior trainer before that
Q6	How many years accumulatively do you estimate you have worked in design/development for WBI?
A6	I do both Web and instructor led so the combination of that is 19 years …wait let me think, web based probably didn't become popular… We were doing computer based learning from hard drive from CD up till probably '99 so web-based is probably from 2000 on. So about 11 years.
Q7	In those WBI projects, how many years accumulatively do you estimate have served as a lead instruction designer/developer?
A7	I have been lead probably for I would say maybe six years.
Q8a	What's the major of your bachelor's degree
A8a	My bachelor's degree was in applied psychology.
Q8b	Did you have postgraduate education: Master's, or Ph.D.?
A8b	My Master's degree was in industrial organizational psychology, everything else I learned on the job.
Q8c	Have you had any other training on instructional design?
A8c	No
Q9	What's the business nature of your current organization: business/industry, education, government/military, health care, independent, other?
A9	Government
Q10	What's the estimated size of the organization you are working for?
A10	Probably 20,000 people, one of the big government contractors
Q11	Can you tell me a Web Based Instruction project you are very proud of or got highly recognized?
A11	We did a project to teach the military personnel about the culture, what is the cultural in Afghanistan where is the culture in Iraq and we ran a Brandon Hall work for it. It was in 2006 I guess 2005, 2006.
Q11a	How many team members in the project?
A11a	There were four instructional designers, probably three graphic artists, a couple programmers, a couple of QA people.

Q11b How long did it last?

A11b About a year and a half I guess

Q11c What was the project about, was it about how to complete a step, process, use systems, or how to perform physical jobs, or change attitude/value?

A11c It was about culture in Afghanistan. It taught them about… It prepared the military members before they went into the country, about things to expect, things to do, not to do, about the differences between American culture and the culture there, about their religion, about the food, things like that. That was the nature of the content. That was a lot knowledge based.

Q11di Describe the project in a very high level (the process by stages)

A11di For that particular project, the client had already done the front end work and they already had done the needs analysis and the contract .They gave us the plan essentially for what they wanted, so we were just their developers/designers. We developed the meeting plan that included the learning objectives, the instructional strategies, uh… the interface design. uh… the testing strategy. They did not have any test for that, they did not want to test people on that. They just wanted them to get information. So after the instructional design plan was approved, then we moved in to production or storyboarding, developing storyboard then they went through QA. We had an in-house tool we used for storyboarding that streamlined the process… Once it's down in our storyboard tool, there was a lot programming that had to be done by the programmers. They created the media, after that the graphics, audios, the animation, that sort of thing. Then goes through QA again, goes through the client. We do revisions and delivered. That's pretty high-level.

Q11dii Describe the project in as much low level (steps, tasks) as possible

A11dii For the instructional media and design plan we…there were… each...this particular client had a very specific format they wanted in, they have certificate requirements and in the report so we follow the plan they provided, the information they wanted which included developing a static prototype which was just about how the interface was going to look like, what function that involved working with the graphic artist team, and the designers came up with a plan - the interface, the strategy, and provided the client an idea of how the interface is going to look but not really the functionality because we did a static prototype first then then we did a functionality prototype, which was a lot cheaper than to produce to get all levels to buy in and then have them didn't, not like it. So we did a static prototype which provided a terminal learning objectives which were high-level objectives, then enabling learning objectives which were the core. In that particular case that was all knowledge base includes writing the standards and the score of completion, that was 80 percent of the test would be the standards of the completion. We typically developed one module one step at a time because you wanted to deliver it and got buy-in from the client before you moved onto the next. How many modules in that one? I believe there were nine modules, each one has two or three maybe four lessons. We wrote the storyboards and delivered the storyboards. Then we might deliver in chucks, like two modules at a time so

the client is reviewing while we're working on the next set. That particular client, each client is different, we try to tailor our process to their needs and what their schedule is. That's something that the project manager does upfront, to look at it, to schedule the delivery, and what they want, and build up the process that will help us achieve the goal, the appropriate process, etc. For that project, we had two SMEs. They would answer the question if we had for them, we had to do a lot of research on ourselves they did not provide a lot of information. We had to go to the books and references. They had some materials from an instructor led course they used to offer. They did not offer a lot or better expertise. That was general information anyway, not job specific. You can get them from Internet, libraries, about different cultures, about aspects from UN. It was a lot of research. They were not real thrilled on that project because the course was replacing job or at least part of their job they taught, several courses, one of courses was being converted to web-based courses, so they were not terribly helpful.

Q11diii What event/communication marked with beginning the project?

A11diii Usually, for that particular project, we received a statement of work and they had people sit on that. We offered how we would do it and how much money we would do it. They chose the contractor. So that was the statement of work. We were bidding for that project, and that was the project manager's job. I was not in the meeting. Now I am sometimes writing proposals, back then I was not.

Q11div What event/communication indicated the completion of the project?

A11div I guess we call it validation. We went out and delivered it or we had a group of target audience took the class, the courses. They provided feedback. Based on the feedback, we delivered revised version. And then we delivered the final version of the courses in DVD to the client, the client implemented it to their intranet.

Q11dv What was your role in the project?

A11dv I was an instructional designer, I developed the storyboard, and I helped to coordinate the production of the project and media. We did formative evaluation. We went to one of their sites and tried out on the target audience from the course beginning to the end. We collect the feedback as they go through: If they got hung up anywhere, if any problem they have. We write down their comments, how much time each lesson takes… We had them do level I evaluation: What do you like about it, if anything bothered you, that kind of thing. The client never came back for revision after the implementation.

Q11dvi What software and services were used?

A11dvi We used an internal software tool that is proprietary. The output is HTML pages that anyone can edit including the client. It is called YYYYYY. It uses a database and we enter graphic instructions, audio instructions, other media instructions. That’s where I used to create storyboard. It generated the courses we can use for production. The programmers and graphic artists can use those instructions for production and instructional designers can edit content without going through programmers. Flash was used for animation.

Q11dvii What hardware and devices were used?

A11dvii Just PC.

Q11e What were the outstanding features of this project?

A11e The interactivity. We created two levels of interactivity. The trainees would get a lot interactions that allows trainers to practice, interacting with characters, so to speak, of that culture where we gave them situations, and they gave choices based on what they learned. Then they will give feedback whether they insulted that person or that kind of thing. Every lesson has that interaction that allows them to practice, it's like a case study, sort of. It was visually good to look at. I like that project a lot because the content was interesting. A lot of projects I developed were pretty dull, that one was interesting content. In a way the interaction makes content more interesting. The content of the project was not broken down in any order. We do not require any particular course to be taken prior to other ones, they can take the courses in any order they want. There were lessons on religion, on food, restaurant, language, etc. They are not built on each other. They were just distinguishing.

Q11f Did it occur to you that you wish to have done the project differently?

A11f If we had more budget, I probably would have done more the EOB based scenario or allowing the trainees to interact with… Like today we could use avatar - human state animation- to do it, they are very practical. They will come into existence, have more person to person interaction between the learners and the characters than the low level kind of still learning.

Q11g What were the solution(s) to the challenge(s)?

A11g Not much challenge for that one. I have had much worse budget challenged projects. When we felt pushed by timeline, we put more people on it. We had a standardized template a working mode, so more people can work from it like worked by one person. That's our quality control standards -what styles, what this character does, what languages used, what word level you repeat to, K-12 level, college-level, depending on the audience. So everybody works from the same plan and that's the internal documents. For that project, the learner characteristics were given, other projects we would have to do a full-term analysis and collect that kind of information specifically- what they age level, what their education level, work related information.

Q12a What specific knowledge, concepts, and ideas that helped you?

A12a We used Bloom’s taxonomy, Bloom’s six levels of learning. We used that taxonomy to guide how we developed our learning objectives, the instructional strategies we used to teach depending on the level of the objectives.

Q12b What soft skills did you use?

A12b Writing, attention to details, be able to work in a team because we need to interact with other instructional designers, artists, the programmers and media production staff. You'll be able to communicate with them clearly. We learned a lot that the way the graphic artists think is not the same with the way an instructional designer thinks. You write the instructions for the artist not for yourself. Dealing with clients was the project manager's job. He or she

knows when to raise a red flag, recognizing when there's a problem or potential problems. I think creativity, developing (writing storyboards), interacting, communicating are the essential soft skills. You have to be able to communicate with your SME, have to tailor to their style, because each SME is different, be able to interact with them the way that works for them, whether by e-mail or telephone and… We had a customer, they were working oversea, they could only call us in the evenings. It also will… know how to ask the right questions because sometimes they may know what they do so well that they don't think about the details, you have to able to extract the details from them. That's the skills you have to develop because if we don't recognize that some things may be missing in the process, the SME is not going to recognize that because they were doing that so long they don't think about the details. Some SMEs we mentioned earlier on the cultural project were not very cooperative. They were not returning phone calls, they were not responding e-mails, we had to call and call until somebody got on the phone. At some point we had to go to the client, the one who was paying the bill and told them we're stuck here because we are not getting what we need. Can you help us? Can you intervene? You don't want create bad relationship with them but you have to go over the head to get what you need. Each one of them are very different. You have to work with them.

Q12c What hard skills did you use?

A12c How to use computer, and our proprietary software.

Q12d What attitude did you realize that was helpful for the success of this project?

A12d Patient, curiosity was good in terms of doing the research, a good attitude for people working in the military

Q13 Which year was the project? What do you wish to have known that you didn't know back then?

A13 Started in the end of 2004. It ended in early 2006.

Q14 What are the other knowledge, skills or attitude which were not used in the above project but you used in other Web Based Instruction projects you led?

A14 That was the project I learned a lot about working with graphic artists. I guess if I had known that back at that time, it would have made it a lot more efficient, streamlined. There was a lot of rewriting of graphic descriptions. I had to edit it over and over again because I hadn't been written it clearly for the artists.

Q11a Can you recall a project from which you learned the most? How many team members in the project?

A11a More instructional designer, two technologists, a huge team of graphic artists probably 6 or 7 when it came down, one programmer, a project manager and a media production specialist and a team of quality control people. We had a document production team as well because for that particular project we produced real-life case material and PDF format, so we did that production on this case materials and put them in the PDF format. Probably 15 people.

Q11b How long did it last?

A11b Almost 2 years from now. It started 2007 and was on hold for a year, we did a test then retesting 2007 and 2008, was on hold in 2009, we started the

229		production in early 2010. We just finished our formative trial and revision
230		and we did the validation in January. It was a longtime project.
231	Q11c	What was the project about, was it about how to complete a step, process, use
232		systems, or how to perform physical jobs, or change attitude/value?
233	A11c	A specific job for government agency so we had to do a full job analysis and
234		task analysis to determine what they do on the job. We developed the training
235		performance. It's very detailed training, testing validity reliability testing. It's
236		about teaching the knowledge the skill and the process.
237	Q11di	Describe the project in a very high level (the process by stages)
238	A11di	Analysis and planning, design and development. I was a design lead for that
239		project, I support the project manager. The project manager actually worried
240		about the schedules and money. The design lead does everything else:
241		coordinating the team of the production, make sure everybody's was on path,
242		the standards of maintaining, that sort of thing, and evaluation.
243		Implementation, we had a team to put everything in the server. Make sure
244		everything went correctly. After implementation, anything happened after
245		that goes to the maintenance team.
246	Q11dii	Describe the project in as much low level (steps, tasks) as possible
247	A11dii	From the beginning we did the job analysis, and we tried on the very small
248		target audience. We did a small focus group. And then once we had the job
249		done on the high level duties, the human performance technologist went out
250		and get authorization in the field. They also did in the focus group in the field
251		to determine the tasks with each of the job duty. Once the task analysis was
252		complete, we passed it to the quality control and client review. Then we
253		moved into design which includes instructional design report and learning
254		analysis report which is the terminal learning objectives, the enabling learning
255		objectives, the instructional strategies, the testing strategies, the static
256		prototype. So we delivered the learning analysis, the instructional media
257		design report, got feedback on that, did revision, then developed a functional
258		prototype which is usually 10 to 15 screens that show our graphic user
259		interface with the instructional strategies. We got feedback on that, got buy-in
260		on that, and then our programmers built the back-end of the course using a
261		template while we do the pre-design which is chunking the content we have,
262		taking the tasks the task data from the task analysis, and put into what
263		would've be in each storyboard, a set of storyboards, what we will put in the
264		interaction… We don't call graphic design as pre-design, in pre-design was
265		just chunking. Then we take them to SME, make sure we are understanding
266		the content correctly, we are not missing anything, we are on the right path.
267		Then we take the pre-design and put into the tool, the storyboarding tool
268		where we create the graphic description and audio description the audio script
269		animation description… Everything that appears on each page or interaction.
270		That goes to quality control, we do a review with that to ensure the content
271		was right, the validity. Then we delivered to the client, then we moved in the
272		production work, concurrently the storyboards have been done, the testing
273		team has been developing the tests that would go alone with at the end of the
274		lessons or modules, for this particular project, the test was at the lesson level.

Because the lessons were so large that we tried to test after lesson would be overwhelming if it is too far between tests. It could be a week between each test. It might end up with three-week long training. So, the tests were developed by human performance specialist while the designers developing the content, the storyboard. We also had to identify the cases. The case studies would support the exercises they will be getting because the interactive trainings where they had to actually use the real case studies performed the steps they wanted to on their job. So it's really development of case materials, so the three things were going along concurrently: the development of the case material, the development of tests, and the development of storyboards. Once the scoreboards were done and approved by the client, we went into production, the still graphics, the animation we used an Avatar mentor character in this particular project. So all production was going along simultaneously with the quality control cycle. The tests go through reliability and validity, but as instructional designer, I was not really involved in that, unless they need another body in the room. The whole focus group with SME review it and provided the feedback for reliability, with all the tests and the case material was done, the courses went through a series of trials formative evaluation. Trainees go through the trials and provided comments. They recorded their time data, did the level I evaluation, we implemented changes from the trials and then we go into the validation where novices go through the training and we have to get a certain number of them to pass the training, and test what they are supposed to, and train them as they were trained to. After validation was completed, any tests and revisions follow. Then we delivered to the client internal server, they did internal testing to make sure that it's functional and then it is complete.

Q11diii What event/communication marked the beginning of the project?

A11diii They provided us a work order, we competed our contact, a five year-long contract. So they provided us the work order to develop the product. This is the client we worked with over and over again, they came to us and said we had this job, so go do it. Our project manager would involve in developing a plan, a schedule and then we go from there. We usually have a design kickoff. We also have production kickoff where we would include the artists the programmers for the interface design that sort of thing. And then would provide them directions based on the outcomes of the report we developed which the client signed off. We do have weekly project meeting basically just the design team, especially the front end, because really doing the early stages just the design and testing for the working graphics. Programmers are involved once… we do not really involve the graphic artist while we are storyboarding, we involved them in the back end once the storyboards were complete and approved, they started working on the graphics.

Q11div What event/communication indicated the completion of the project?

A11div Implementation on their server. Once the testing was complete in their server and testing was successful - it can be accessed in the field, then it's considered complete.

Q11dv What was your role in the project?

A11dv I was a design lead and still am. So my job was to coordinate the design team, and the project manager. I work closely with the testing team lead, make sure that everything happens in the content also happens in the tests. I was responsible for making sure the production team for tasks and were writing a weekly status reports on the design functions, I also developed storyboard for two modules. I was responsible for putting together the design standards document and maintaining the design standards throughout the project. I was responsible for working with the instructional media designers. I was in the job analysis. I was not in the task analysis that was the job of human performance specialists. Although I had a degree on that, I do not enjoy that part, although my managers had asked me if I wanted to go back in. I stick to instruction and design, which I enjoy a lot.

Q11dvi What software and services were used?

A11dvi Same thing. We used an internal software. We also used Avatar software, myself I did not use it but our artists used it. That was new. I asked a lot of questions about the software what he can do what he cannot do. I don't know a lot about software. I don't know about HTML but I do recognize something small and I can correct it myself. We used a lot of templates so developing a templates up front so we'll can tell the graphic designer or artists and programmers what to do, so designing upfront requires knowing something about the software. I cannot tell you what software to use, but I know I must tell the dimensions, the graphics specs, whether it is opaque or transparent that kind of thing from the visual perspective. I don't know anything about Photoshop. We had a lot of job aids, a job aid library, with sample documents, sample templates, sample work. We have a SharePoint site, which was our central point for sharing communication or information.

Q11dvii What hardware and devices were used?

A11dvii Just PC

Q11e What were the outstanding features of this project?

A11e The use of an Avatar character in video, the size of it, very large and complex. That was completely online, that was the first project we had to complete the testing electronically. The other projects from the client used to be paper-based and the tests would be paper-based. We needed the test administrator, security for the tests all sort of things. The first one was completely online. The cases were electronic, the tests were performance-based and able to be captured electronically. It is very visually appealing.

Q11f Did it occur to you that you wish to have done the project differently?

A11f We ended up switching gear halfway, the original interface ended up not working with the Avatar and it wasn't visually appealing. So we started the production and went back. We re-did a lot templates with new graphics. We re-did screen by screen interface so it said better with Avatar, because the Avatar the key mentor was the key instructional strategy in this training. Because they're worth it, very small number of people doing the job. There were not a lot of experts in the field. They could not go to elsewhere for information for help, so we try to fill in the electronic mentor character so it was important to have the mentor be one of the central pieces, focus of the

course, I guess. We wasted a lot of time. We also had another lesson learned. We had a programmer who built a prototype, functional prototype outside our tool. When it came upon starting building in the tool, nothing was working correctly. So we had to have a different programmer who re-built all the templates. He was a new programmer…It was a mess. That all had to be fixed before we can continue.

Q11g What were the solution(s) to the challenge(s)?

A11g To prevent that happen again, the managers had a big meeting about processes, establishing procedures and some documents in our repository, to try what thing had to be done upfront, what was supposed to be done. We had big project last year the size of the team was tripled in size of our team, there were a lot of new people, not everybody knew our production procedure, so everybody had to go through the repository, to know the production process, the workshops on it regularly, and so everybody got trained at the door.

Q12a What specific knowledge, concepts, and ideas that helped you?

A12a Again we used Bloom's Taxonomy to determine the instructional strategies, and to task analysis, the values, the criticality, the frequency…

Q12b What soft skills did you use?

A12b The same with the last project. The creativity, the communication skills, the organization skills, management skills because I had to manage a big team of people. To manage them, I had a very large spreadsheet, I tracked all the tasks that they had to accomplish every week, they had to go in to indicate what percentage of completion they had for each lessons of the topic, we also had regular meetings to report the problems, to process the status, so it was a lot of communication.

Q12c What hard skills did you use?

A12c Same hard skill, writing and computer

Q12d What attitude did you realize that was helpful for the success of this project?

A12d For this one, we needed patient because we had one subject matter expert, we had to wait our turn to get attention because she was also involved in the customer development, she was the one writing our case studies, she was one validating our content storyboard, answering questions so we had to be patient. There were some people having problem working with standards I guess, learning how to manage people to get them to do what you want them to do without making them feel they were being told what to do, it was an interesting challenge. I guess it was a management skill.

Q13 Which year was the project? What do you wish to have known that you didn't know back then?

A13 The project was started 2007 and lasting till presently. I wish I had known more about the other part of production in the beginning, although I learned about in now, learning is always a good thing, new technologies and such. It was my first project with this particular client, so I learned a lot about that. Something I wish to have known where the challenges were, where the problems were. I learned a lot about internal production process for this major client

Q14 What are the other knowledge, skills or attitude which were not used in the above project but you used in other Web Based Instruction projects you led?

A14 I think we should focus on the learning and not on the technology. A lot of clients wanted to develop and not as concerned about the outcome, but I think the training should be focused on that outcome, on things what can be done not entertaining the processes. And I think it is important that we as instructional designer to convey that.

Q15 Assuming you are hiring a person as a beginning instructional designer in Web Based Instruction, what skills are you expecting?

A15 They had to be able to write well, to write learning objectives, they had to be able to storyboard, and know what a complete storyboard is, not necessarily use our tools, but they should know what a complete storyboard is, they should understand instructional strategies, what different instructional strategies that are available, and they should be able to take instructions from others and implement in terms of being handed from media report or design plan with some directions and be able to move forward with the project.

Q16 Assuming you are hiring a person as an experienced instructional designer in Web Based Instruction, what skills are you expecting?

A16 In addition to all the things a junior does, I would expect that person to be able to lead the project in terms of directing junior designers and preparing design standards and design plan, be able to conduct focus groups, to lead the trials or validation, to lead a team. Not necessarily managing, but be able to mentor junior staff, to educate them to write the specs, the reports, or follow the right process.

Q17 Which direction do you see Web Based Instruction is heading to?

A17 I heard a lot of social media for instructions, I'm struggling how knowledge sharing can be used for instructions yet. It is true for instructional testing. You can use the social media to convey the information but not necessarily performance based instruction. I'm curious how we can integrate the social media aspect to instruction without losing the integrity of the instruction itself. I went to a lot of webinars on social media, but I want to see if it is working before implementing any.

Q18 What do you think an instructional designer should do in order to keep up with this direction?

A18 Several group out there such as is ASTD, ISPI offer meetings, online materials, there were a lot of training, webinars, white paper that are out there you can utilize, just make sure you keep reading to keep with what's going on. I haven't been pushed a lot to get more education other than my job, although we did white papers.

Q19 Anything else that was not covered in our conversation but you think is important?

A19 Not I can think of now.

Q Well, that concludes our interview.

Transcription of Interview 002

Q1	Good Afternoon, thanks for taking time with me. Can you tell me your current job title?
A1	We don't have a lot of formal titles here, but I guess it would be Lead Instructional Designer, or Performance Consultant.
Q2	How long have you been working in the current position?
A2	Five years.
Q3	What's your age range: 25-35, 36-45, 46-55, and 56 above?
A3	56 and above.
Q4	Would you say you are actively involved in instructional design?
A4	Yes.
Q5	Are there any other positions have you held before, that were related with instructional design?
A5	Yeah, I have been doing this for since about 1982. So yeah I spent many years as a freelancer, when my kids were little. But I've also worked for a couple other companies.
Q6	How many years accumulatively do you estimate you have worked in design/development for WBI?
A6	Probably, I would say, 15 years.
Q7	In those WBI projects, how many years accumulatively do you estimate have served as a lead instruction designer/developer?
A7	Probably all of them.
Q8a	What's the major of your bachelor's degree
A8a	Studio Art.
Q8b	Did you have postgraduate education: Master's, or Ph.D.?
A8b	I have a Master's in Studio Art.
Q8c	Have you had any other training on instructional design?
A8c	Well, other than taking a master's-level course in Instructional Media and Writing, which was a long time ago. Other than that, all of my education has been self-taught, learn-on-the-job. I've been sent to many seminars, workshops, a lot of those over the year. So everything from technical writing, documentation, to writing evaluation questions, to…I don't know, I don't even remember all of them. I've gone to a lot of workshops throughout my career. Yeah. And that's one thing that my boss does do. If there's a workshop that's local, she will send us to those. So I've been to a lot, been several since the past few years.
Q9	What's the business nature of your current organization: business/industry, education, government/military, health care, independent, other?
A9	I guess we are categorized as business, services, or business consulting, or something like that.
Q10	What's the estimated size of the organization you are working for?
A10	We have 12 people. It's 12 employees, but we also have a larger group of freelancers that we work with. So we are sort of scalable. We have a big data base. We probably have somewhere, I don't know, between 30 and 50

freelancers. Number that are working is given at a certain time may be, I don't know, 10 or 15.

Q11 Can you tell me a Web Based Instruction project you are very proud of or got highly recognized?

A11 Yes, I do have one in mind…Okay um the project was called…the real name of it was YYYYYY and the course was designed toward one of our clients, often scientific, and they manufacture medical devices and the course was for their internal quality auditors to go around to different locations, sites within the company and make sure that the sites are following compliance with quality procedures and systems, most of which are mandated by the federal governments. So this course was to help teach auditors the process by which they would be effective and become excellent auditors when they perform these audits. Yes, the very high-level mental skill, so it was teaching them…a combination of teaching them the processes, procedures, and how they would internalize those processes and their own knowledge and experience to execute the audits at a very skillful level. So yes you call it a skill-based course, you know, and its basic and it also involved a lot of the information and abstract concept.

Q11a How many team members in the project?

A11a On our side, uh, YYYYYY side of the company I worked for, there was project manager, me the instructional designer, a programmer, and a graphic designer. On the client side, there was also a project manager, and a subject matter expert. The subject matter expert was also the reviewer, although there was his boss also who provided review. On a day-to-day basis, probably, in this case, we interacted equally with the subject matter expert and the manager, the project manager…because this content for this course was so complex, the subject matter expert had to play a big role, I mean it was just like interview at once and then I went off to the course. He was integrally involved all the way along the course in developing the content and instructional strategies and practice exercises and that kind of thing. The project manager was also highly involved because she was also… had a lot of instructional design experience, so she worked with both of us to develop the content. So it's really a team in that way.

Q11b How long did it last?

A11b Well, it was a very, uh, I'm not sure I can give you a time, the actual time that the design and development took to actually do the work. I can tell you the last time this was actually took over the course over a year from start to finish. I think it was about 14 months but a lot of that was due to the fact that our subject matter expert was often unavailable because he was off doing audits. So he could not meet with us or he didn't have time to review material until he got back to his staff. So that was part of the reason it took so long. This was 2009. The bulk of the work was done in 2009.

Q11c What was the project about, was it about how to complete a step, process, use systems, or how to perform physical jobs, or change attitude/value?

A11c It was about skill, process and knowledge.

Q11di Describe the project in a very high level (the process by stages)

A11di OK. Well, we started out our process here at the YYYYYYY. It's pretty much the same for every eLearning project. We start out with a research and analysis step, and we move to design, to development. The link of the development is really a couple of stages within that. There is the instructional development—what I do is design the course—and storyboard, and then I turn it over to the programmer and graphic designer. And the graphic person obviously developed the graphics, and the programmer programs from my storyboard, and then inserts the graphics. We have an extensive review process built in both at the design stage and the reviewer… The client reviewer reviews the design before we have the development. During the development, we have a review of the storyboard by the client. They usually get one time to review the course, we make revisions, and they get a second chance to review the course. And generally we are done. Although this case we had more review cycles just because it was so complex, after that, it goes into testing. We tested it here, and then we tested it here, we tested it on the client site, on their learning management system, and they have their own, after we approve it, they have their own viewer testing and acceptance procedures, And once everything is good, pretty much the project we turn it over to them and they take it from them. We build in a level-2 evaluation into our courses typically. There is typically a knowledge assessment at the end of every course, which we build, and on the client side, they are able to collect through their learning management system and are able to collect the results of any individual learner's task. And they usually have an 80% pass-fail range. And our Level 2 evaluations can be very simple from, you know, ten questions of multiple-choice and true-false, up to things more complex, like in this case we built actually a pool of questions based on learning objectives, I think it was something like 30 or 40 questions in the pool. And then the programmer built the logic so that for every objective, I think each task was maybe 15 questions and it was built so that at least one question for ever learning objective is presented each time that learner took the evaluation. Now our clients typically have their own Level 1 evaluation, and they administer automatically at the end of every eLearning course. We usually don't create that here because they have their standard ones. As far as Level 3 and Level 4, we often, I would say, typically are not up to our clients to do anything at Level 3 or Level 4. So I mean occasionally it happens, but typically and especially with eLearning, they are not interested in taking the time and effort to do that. So any kind of Level 3 or 4 data collection is done anecdotally. And in fact we did collect some for this particular course because we gave a presentation on it at an ISPI meeting. And we were able to collect some anecdotal evidence that the learning could be applied to the job and it did have a positive effect on corporate goals. Typically when it's done it's done, and throughout the user testing and our testing, their testing, we identified any errors or bugs or any other problems like that. Any content problems have been identified and corrected at that point. So typically we are done. No revision after implementation. The only time that we may revisit a course like that was if the client comes back to us at a later date and says that "You know,

our process has changed and we want you to revise this course". And then we really consider it as a new project, even though we may keep the basic course, we still consider it as a new kind of development project.

Q11dii Describe the project in as much low level (steps, tasks) as possible

A11dii Well, let's see. Typically, the research-analysis phase, I will gather first any documentation, and then the client can provide, and then I can review it and start to understand the concepts. Then we will have a meeting or a series of meetings with the client and the subject matter experts so that I can talk to them about, first of all, what I understand and don't understand about the content, and then also have them talk about what they think needs to be taught and what their leaners need to understand, you know, what should be emphasized and what's not important. And that's typically difficult with subject matter expert because they think it's equally important and that everything should be taught. I pretty much gather information and then my next step would be to sift thought that information that they have provided and try to determine what is really important instructionally. One thing we actually don't do but should be doing according to the proper procedure is we do not usually do a task analysis, because again our clients typically don't wanna pay for that because they usually come to us with an idea already in mind of what needs to be taught. So we did usually have to rely just on the subject matter expert, observing you know real learners in their jobs and figuring out what they do. In this case, at some point along the way we were able to do some observation. Actually the project leader on the client side did some observation and took some copious notes and sent them to me. One thing to mention too was that the complicating factor in this case was particular client is located in Massachusetts, so it's not like I can easily go and it's a big deal to make a trip there. So we do as much as we can virtually as possible. So anyway, at the end of the analysis stage, I will, I think in this case I did write up a report of the analysis and some initial ideas and what the learning objectives should be and our instructional strategies should be. Don't always do that at this stage but in this case we did. Next we move to the design phase. And in design we started a design document that we have a template design, and that document we use covers all the bases and designs. I wrote that up, wrote a draft of that, pass to the client for review, we met and we had a meeting to review the design and I gather their feedback, did a revision. I think in this course just because it's so complex and the fact that the original directives of this course, the manager in charge of the auditing group changed over the course of time, that we went through several iterations of the designs more than what we would normally do. Our design document consists of some we call our up-front, scenario setting information like who is the audience, what are the goals of the course, what are the learning objectives of the course, what instructional strategies in general we would use, what evaluation strategies we will use and things like that. And then ends with a content outline, which is actually the bulk of the document, and the content outline outlines the lessons, the topics and in the course we have these covered. For each of those provides the instructional…the presentation and other

instructional strategies we are gonna be using for that topic, like , is it going to be a simple presentation of checks and graphics, or is it a demonstration that's gonna have a practice exercise, is it gonna have questions, that kind of thing. And how long each segment will be, each topic will be will change, you know, approximately how many screens, whether it will be using things like pop-ups and other types of media, like audio and video, things like that. So that's what's in our design document. So it's pretty detailed and meant to be detailed enough so that when finally approved, we get to go ahead and develop. I can write my storyboards fairly easily from that design. Yes. So we have templates for our storyboards, um, actually, I should say for each course that we're developing, we develop templates for different types of pages or screens in the course. And we have the templates created in Microsoft Word. And we actually put in the background of each Word page a picture of the course interface because we… I forgot to mention this but at this point or just before this point, we will also be developing a design prototype, which will be the look and feel of the course, and a functional prototype, which will show how the different main interactions will work in the course. So for the design prototype, the graphic designer will take a picture of the course interface, and that will be put into the Word storyboards. And then I, as the instructional designer, will take these storyboards and actually place the content on the picture of the interface. So I will know how much of real estate, screen real estate I have for all the components I wanna present on a given page. And if we have audio, which this course did not. But if it does, we will provide on the storyboards the audio script that will accompany each page, even down to putting in the cues, the cues if, you know, certain audios play only when certain graphics and texts are displayed on the screen, then we put it on the script. Well, the phases of the development are me writing the storyboards and getting them approved, so typically I will write the storyboards and I will send them off to the client for review, and they will identify any changes they want, and we will have another meeting to go over their feedback. I will make revisions and come up with a final set of the storyboards. Then I will turn over…internally here we have what we call a "storyboard turn-over meeting," and I will meet with the graphic designer and the programmer, and they will review, in advance of that meeting, also review the storyboards, and then we will meet so that they can ask me questions about anything that I've specified in the storyboards that they may not understand or if they think if, you know, an interaction that I've specified is too complicated or it won't work or whatever, they will help me and if we need to work out any changes, you know, those kinds of things. We'll do that at that meeting. And then they will take it away, and they will produce the media assets and the programming for the pages of the course. If we need to have audio done if the course calls for audio, we will typically use computer-generated audio for the first draft of the course so that we are not investing money into professional voice-recording until the client has approved of the content. So that will be done as part of the programming. If there's anything like video or animations, we will try to have at least a rough cut of those done for the first draft of the course so the client

can see what they may look like. But we have the final versions. So it's always a matter of balancing the time versus cost versus efficiency equation when we develop the first draft of the course. So typically then we will have a completed first draft version of the course, the program, and we will provide a link to our course to our client, so the course will actually be residing on our server, and they will use the link to view it. They will go through the course, we have a review tool, an automated review tool that they can link to from each page of the course so that they can enter their comments or changes in there. And then we give them a certain time to review, and they provide their feedback. I review their feedback in the review tool, and then anything that I don't understand I will meet with them about. So the client answer, typically they can be very unspecific about their feedback, saying like "I don't like this page", you know, something general like that. So I will have to meet with them to find out what about that page didn't you like, and what should be changed too and things like that. Then I will pass all of their comments to the programmer and the graphic designer if necessary. They will, and usually this entails me making very specific additional clarifying comments on the client's original comments, saying "Ok here's what you need to change on this page," "Here's what has to be different," you know, even down to wording changes. So they will then take it from there, they will make their changes, I will check their changes to make sure they've done them right. Sometimes this cycle goes through two or three times until everything's been fixed to my satisfaction. And then we again send it out to the client for another review. They will give their…typically we only give them two reviews. At this point they will have their final review and give any last changes that they see. If there are any changes left we will make them, and at that point we will put in…we will have the professional audio recorded because we now have the content completely nailed down and approved by the client, so that we can then spend the money and get the professional voice to record the audio. And then any final other media that we need to include will be completed at that time. And then, the course is sent out to them, what we tested out internally and typically on their learning management system to make sure everything is functioning. And then we give them the go-ahead to do their internal testing for functionality type issues. If there are any more problems identified at that point, I really have very little to do with it, it goes back to the programmer to make any correction. And that's pretty much it.

Q11diii What event/communication marked the beginning of the project?

A11diii We talked about after the client already contracted with us to do the project, so the first event would have been what we call a starter-work meeting. And that's when we meet with the client and, on the client side, we met with the project manager and the SME. On our side, it was me, the project manager here, and so we met with them to talk about the project, what's expected, the schedule, deliver, staff, that kind of thing

Q11div What event/communication indicated the completion of the project?

A11div The ending event…let's see. The ending event was…I remember we talked about this because I remember saying we ended this when they accepted the

finished program and we turned it over to them. So it wasn't a specific event, it was more like, okay, everything is done and problems are fixed and it's ready to go. Yeah, through email, or phone.

Q11dv What was your role in the project?

A11dv I did all the design, all the analysis design and development, you know, up till the point when it was turned over to the programmer. And then after programming was done, we talked about it last time, I had to review the program course and do a quality check on the course and make sure everything was the way it should be as far as content, and so as far as functionality. So and then, after that it was turned over to client to review, then I had to review their review comments, any changes they wanted, and then that involved meeting, probably more than one meeting, um, and then I have to relay the changes to our programmer. So that cycle went through a couple iterations before the course was done. Progress reporting was done by the project manager, so she…I relate to her. Usually what we do is I got a schedule I have to get each step done by, so she knows, project manager knows when I get it done, and she provides data and updates to the clients. Project manager does meetings scheduling. It depends on what it is. If it has to do with design and development of the content, I need to talk to the client about content issues and questions. Then I will be initiating that contact directly. Otherwise it's project manager's work.

Q11dvi What software and services were used?

A11dvi Yeah we used Microsoft Word, primarily to do the design document, and the storyboards. And they used Excel for different things…if, you know, whatever we were doing works better with Excel. So basically, Microsoft applications. When it gets to the programming and graphics, that's different, obviously different softwares. They, in this case, used Flash to program and the graphing artist used Photoshop and Illustrator for the graphics. I don't think we have anything else in that project. Generally no programming and graphics for me.

Q11dvii What hardware and devices were used?

A11dvii Well, I have a laptop. And that's where I do all of my work. And, you know, we have a complete system, local area network here at our office with servers that store all of our files. And all of us individually, no matter what our task is, use their laptop to do their work.

Q11e What were the outstanding features of this project?

A11e I think it was the probably the level of interactivity in the course, the ability for the learner to create their own learning path through the course, being able to have a lot of resources available for reference, being able to do a lot of scenario-based exercises. So I think all of those together made me think this is an outstanding project. I really think, I guess…to add to what I was saying, the scenario-based learning, is that it's so relevant to the learner's job performance, so it's really performance-based. We talked to the client about the performance change as far as mainly anecdotal, because we did the presentation at an ISPI meeting about it, so I asked them to please come up with any kind of feedback on how the course affected performance, so it's

mostly anecdotal. We didn't have data per se, but there was definitely evidence that performance has been positively affected.

Q11f Did it occur to you that you wish to have done the project differently?

A11f Oh yeah. I always wanted to do them differently. Well, I think we talked about it a little bit last time, I definitely would have wished that we could have done a performance analysis up front to full task, which we didn't do. I think if I could have observed and interviewed the leaners, their jobs, and talked about what they needed, I think we could have saved a lot of time at the beginning. It was basically the clients prevented us from doing that. They didn't wanna do that. Because we started out and they thought they knew exactly what the course was gonna be, and as I told you last time, it changed a lot over the course because the client on the client side…the person who we contracted with, the learning group within that company, had thought she wanted one thing in the beginning and it was very cut and dry, at the end it was totally different. I probably would do some of the content differently than I did but now I'm not sure exactly how. There was a lot of content in this course, a lot of text, so it was heavily text-based, which I tried to just talk them out of, but the learners, the auditors like to read, and we left it as that. But I think there was too much text in it. So I might've liked to do it a different way.

Q11g What were the solution(s) to the challenge(s)?

A11g Well not in this project. Those are things that I continuously try to work on with every new project. I may apply what I learned to future projects.

Q12a What specific knowledge, concepts, and ideas that helped you?

A12a I think basically the good old ADDIE model and instructional design. We are very heavily invested here at our company in performance improvements, so human performance, technology concept. So I tried to improve everything that I do. Not always easy, especially when the clients think they already know what they want. Just being able to…this is more the skills, into the next question, but I'm very detail-oriented, and I'm very focused on how to translate technical information into something that's teachable, so that's particular skill that I think I have…have been doing for a long time. And just basic writing skills. Teaching skills, I think as far as being able to instruct a course that will give the learner the right activity so that they can transfer that knowledge into performance and skill. And I'm not sure I'm answering your question…Oh communication skills, definitely. Interviewing skills. That's another one, because having to get the information from the subject matter expert takes a lot of interviewing skills. Because you have to know what to ask them, and you need to know how to follow up when they answer your first question. A lot of times they don't understand what we, from an instructional viewpoint, think most subject matter experts are not savvy about instructional design. So you have to be able to interview them in a way that they can understand what you are getting at, what is needed, and what learners need, rather than just needing everything that they know. So that's a big part of what I do. There's lots of written material. So I guess there's another skill, because I have to read the documentation and figure out what's the most important

part of it for the instruction. So I do a lot of reading of a lot of material, getting first of all that speed and understanding the topic. So that takes a lot of effort and time, up front usually. And typically that's done with the reading material. So I usually try to go into the first meeting with some background knowledge. And I guess that's one of the things I like about my job—that I'm always learning about how to do new things. Well I definitely need time management skills, but I think anybody that's doing some kind of job, professional job, has gotta have some time management. I don't think that's particular to instructional design. Usually I'm going against a schedule, and I have a deadline, so if I didn't manage my time, we wouldn't have anything done. I usually have at least two projects going on at the same time. They wouldn't necessarily be both equally large, one might be big and one might be smaller. But yeah I usually have multiple things going on. So I do have to juggle and manage my time to get things done. Prioritization is up to me. Mostly to me. But again it's based on deadlines, you know, which one has to be done first. No conflicts in this case. We all got along very well. Now I've had many times in projects where I had to deal with a difficult client, so that does happen. Well, it's usually things like clients don't review materials when they are supposed to, you have to, you know, pull them through a review and then it takes twice as long. And then they decide later that even if they told you something is okay, that they decided later that it's not okay. And that might be because they didn't really look at it the first time and now that they are looking at it and decide that it has to be changed. Now there's always clients who basically don't trust venders and we are a vender to them. So they are always watching to see if we are doing something not right or we are trying to hide something over their eyes, so they don't trust us. So those are difficult clients. I wouldn't say that happened very often though. To handle those clients, well you just gotta be…you just have to keep an even disposition; you have to give them what they want. If they want you to show them every step you are doing because they don't trust that you can do it on your own, then you show them every step you are doing. We find that if we are responsive to clients and keep on giving them what they want that they eventually back off. There's a certain level of trust that eventually we earn. It's very important.

Q12b What soft skills did you use?

A12b (Answered above)

Q12c What hard skills did you use?

A12c Other than writing and computer skills, well, writing is a big umbrella for a lot of skills. So I don't know, you know, that includes outlining, writing style, the appropriate writing style for the application; it includes meeting to write an instructionally sound sentence, so there's a lot of things…that's probably 80% of what I do is writing. If a course is going to be either given to people who speak English as a second language, or it will be translated into another language, then that takes a different type of writing. There are things like, you know, not using slang, obviously, or American terms, or a lot of contractions, being very clear in draft, especially for people who speak English as a second

language. For translation, you know, the same things apply, but we also have to worry about screen real estate, because translation usually takes more word than English, and we have to make sure that we have enough space on our screen to accommodate the extra words. For cultural elements, well, we want to make sure we don't have American culture in what we write, so it has to be neutral. This is something that clients expect us to know, that we will usually talk to them about it if it's an element in the project, to make sure that we understand what they think we understand and what they expect. But I think they generally know, you know, expect us to know the basic concepts including the cultural element. So, yeah you definitely wanna use active verbs, keep the sentence active constructions, shortened draft.

Q12d What attitude did you realize that was helpful for the success of this project?

A12d I think keeping an open attitude to…and this is something I struggled a lot with this particular project, because of the changing a lot. So I had to keep on being open to the fact that they would change, and what I thought would be in this course now turned out to be something different. That's a little frustrating to me personally, because I'm the kind of person that likes to know what it is gonna be and then build it. So when they keep being squishy, and I keep having to change, that bothers me. So it was a threat to me. Maintaining interest in the content, that was helpful. I think that that's one of my strengths, because I do like learning about new things. And with every project I am learning about new things. So that keeps my interest in the project, that I realize I'm gonna learn something new by working on this project and it's not painful for me to work on it.

Q13 Which year was the project? What do you wish to have known that you didn't know back then?

A13 It was 2009. We finished it in 2010, but most of the work was done in 09. I just recently read, I don't know if you are familiar with this book, by Ruth Clark, the Merrill of instruction. You learn it in the science of instruction. I just finished reading their new edition. It's published and there were a lot of research-based principles about eLearning in that edition. I wish I had known back then. You know, knowing what works best for learners, whether how many words to use, whether to use audio versus text, when to use graphics, what kinds of graphics to use, when, where, how they should be placed in the screen, all that stuff. Which I knew to some extent at that time, but with the new research they presented in this edition, a lot of clear-cut guidelines are very helpful for anybody that's designing eLearning.

Q14 What are the other knowledge, skills or attitude which were not used in the above project but you used in other Web Based Instruction projects you led?

A14 Nope

Q15 Assuming you are hiring a person as a beginning instructional designer in Web Based Instruction, what skills are you expecting?

A15 I think they should have some grounding in instructional design theory and they should definitely have the same background in performance improvement. They should be detail-oriented, good writers, able to juggle different projects to some extent. Obviously, if it's a beginning person I

wouldn't expect them to be very experienced in all of that, but they should at least have some of those basics.

Q16 Assuming you are hiring a person as an experienced instructional designer in Web Based Instruction, what skills are you expecting?

A16 Probably the same thing, but I would also want to see that they have a lot of experience from creating instruction. And I'd like to be able to see what they have created. And know that they can exhibit those skills in the knowledge and concept. I'd like to see anything they can show me from different stages of the project. It can be difficult and I understand that. But typically people can bring out something, even if it stripes out the client information. They can certainly show things, maybe not the finished course, because that's usually the most difficult thing to show, but if they can do anything, show anything like storyboards or some sort of prototype or something that would show that they understand eLearning. A strong portfolio. Well, I guess I'll answer that in a reverse way. I would expect the beginner to…that I would have to do a lot of coaching on the job with them, because they may have the theoretical knowledge but not the experience with clients to do the client job. Theory is hardly ever, I mean, I should say, reality hardly ever plays out like theory says it should. So I would expect that they would know they need help getting through a project. And I would say, with an experienced person, I should give them the project and they should be able to take off with it on their own. Possibly able to lead others, although I don't think that's a big thing with instructional design. Unless you are gonna be a manager. Well, maybe leading multiple team member is the case in some places, but that's never the case in any place that I've worked. There is usually a project manager and I'm part of the team, or I'm working by myself on a project. A project without any other team members won't be typically a full-blown course because I couldn't do all of that by myself. But it could be a smaller thing. It could be something like performance support material sample. I expect people should at least know how to use Microsoft Word, and believe me there's a lot of people who don't know how to use it. It's really frustrating. And they should know all the basics, PowerPoint, Excel, Word.

Q17 Which direction do you see Web Based Instruction is heading to?

A17 Well, the big trend we are seeing is the move to mobile. And it may not be what we think of as traditional web-based instruction, it may be more applications, more information-based rather than traditional training, but I don't think web-based instruction is gonna go away. It will stay like classroom training is still gonna be around. But I think a lot of learning delivery is gonna happen more and more on mobile devices. And learning delivery can mean a wider range of solutions. Can be very informal.

Q18 What do you think an instructional designer should do in order to keep up with this direction?

A18 All that's the hard part. You have to be completely heeded into all of the news that's happening, and it's very hard to keep up with. I mean, I have a lot of art and feeds that I keep on my computer, and usually they are through different professional organizations, but just keeping up with all the literature that's on

the web now, it takes me…I mean, I'd like to spend at least an hour a day reading, to keep up with the new development. I don't know I have that much time, but it's something that I have to keep doing. If I don't, you know, the world is gonna pass me by. But I think any designer has to keep up with the latest developments in learning series as well as technology. I think especially when you are doing web-based delivery or any kind of electronic delivery of learning, you have to know what the latest technology is. Not to the level that a programmer might have to know it, but at least understand what it is and what it can do and cannot do. My manager is very supportive. In fact she encourages everybody to do that. I just wished that we have more time to do it. Between various professional groups, and the things they published, and blogs, and LinkedIn discussion boards, there's a lot to keep up with. I have not gone to an international conference in a long time mainly because the president, the CEO of our company who is my boss wants us to be a presenter at a meeting before we go, before she will pay for us to go, but I'm trying to change that. Because we did put in a speaker proposal for the ASTD conference this year and got rejected, so I'm not going. I'm now working with a colleague here to put in a speaker proposal for the mLearning conference, which is coming up in the spring. Hopefully we will get accepted. She typically does not just send us to go to conferences. I do a lot of local meetings though, ISPI meetings here and ASTD meetings. And also the third one is, the Society for Technical Communications, and I'm also a member of that. I don't go to every meeting but it's a good one. Yeah they are expensive. The international conferences are very expensive, especially when you add in, you know, airfare and hotel. If my boss would send me, she would pay for it. But because it's so expensive, that's why she doesn't send us very often.

Q19 Anything else that was not covered in our conversation but you think is important?

A19 I don't know, I can't think of anything. Your questions are very thorough.

Transcription of Interview 003

Q1	Good Afternoon, thanks for taking time with me. Can you tell me your current job title?
A1	Manager of instructional development
Q2	How long have you been working in the current position?
A2	1 year and 3 months
Q3	What's your age range: 25-35, 36-45, 46-55, and 56 above?
A3	46-55
Q4	Would you say you are actively involved in instructional design?
A4	Yes
Q5	Are there any other positions have you held before, that were related with instructional design?
A5	Yes, every positions in the past 20 years
Q6	How many years accumulatively do you estimate you have worked in design/development for WBI?
A6	I would say 15 years
Q7	In those WBI projects, how many years accumulatively do you estimate have served as a lead instruction designer/developer?
A7	11 years
Q8a	What's the major of your bachelor's degree
A8a	I have a bachelor in English and broadcast, it was double major
Q8b	Did you have postgraduate education: Master's, or Ph.D.?
A8b	I have a Master's in English literature as well
Q8c	Have you had any other training on instructional design?
A8c	Yes, professional consulting, 6 Disincline of grade school learning, that's like two days training, I also have facilitator's training.
Q9	What's the business nature of your current organization: business/industry, education, government/military, health care, independent, other?
A9	Business in construction
Q10	What's the estimated size of the organization you are working for?
A10	30,000 employees, it is a global
Q11	Can you tell me a Web Based Instruction project you are very proud of or got highly recognized?
A11	It was a project for culture communications. It was delivered over webinar, so virtual online learning, and it was to help people in the U.S. and people in India better understand each other. It was about team building, team communication, culture communications
Q11a	How many team members in the project?
A11a	Probably 6: myself, SME, a culture communication, a SABA Centra technologist, a SABA facilitator, and another SME from India. Because it was cross culture, just to make sure we were inclusive and were able to design the training so to meet both audience's needs, to be culture appropriate
Q11b	How long did it last?
A11b	About four months

Q11c What was the project about, was it about how to complete a step, process, use systems, or how to perform physical jobs, or change attitude/value?

A11c It is about value.

Q11di Describe the project in a very high level (the process by stages)

A11di This is a synchronous learning. We did needs assessment, to find out what the audience needs were, what was driving the request for the training, to find the right vendor to work with. It was for in-house training. We wanted to identify the right vendor to work with, so we looked at some different Subject Matter Experts. And as well we did the design, like high level design, course outline, content outline, maybe an outline of PowerPoint, then we designed test questions and assessment. For development, we worked with the graphic designer to help us to design some graphics and interactions. Yes, we designed level 1 evaluation, after that, we did practice runs, dry runs and pilot. For implementation, setting up all the sessions, working with the technology experts to test out the SABA Centra environment, preloaded everything into the system, getting everybody scheduled to attend, making sure the pre-work and invitations and got registered out on time, and we rolled out to different session, we offered multiple sessions over the period of a few months. We started capturing feedback.

Q11dii Describe the project in as much low level (steps, tasks) as possible

A11dii In the beginning, for the analysis, we had calls of some different vendors; read some different books what were on culture commutations, we reviews a course this particular vendor had already written for the classroom and considered how we could transfer that to virtual environment. And then we started coming out with the outline once we engaged the vendor, started working on the content, designed some of the test questions, taking the existing final exams and writing them for the web, getting them programmed for the web. We held a series of meeting: we had a kick-off with the vendor, and we had a series of team after that, working meetings to work on the content together, and dry run to go through the PowerPoint, and practice sessions working with the technology team for Centra to make sure we could load into the system and practice using the system. We had the practice session of how to use the virtual environment with the vendor, a series of those, like how to ask questions, how to use whiteboard, how to use chat, how to go to some vote place, the activities we designed. Then we published the course, and did some practice with internal professionals, some already had been working with India, or had been working with U.S., and got some feedback from them and refined the course material after that. Then we launched it and tracked the evaluation and we looked at the evaluation after every course and did some enhancement so it is like a live continuously improvement after feedback on every session.

Q11diii What event/communication marked the beginning of the project?

A11diii A kick off meeting with the vendor

Q11div What event/communication indicated the completion of the project?

A11div We had a celebration meeting, we talked about some of the results, we talked about that some of the other departments had been inquiring the course and

91		wanted to roll out the course to their departments, we had the vendor
92		connected with other departments and shared the results.
93	Q11dv	What was your role in the project?
94	A11dv	Project manager, designer and developer. Which one was more? Probably
95		designer. I wrote storyboard, I wrote test questions, I revised content, I made
96		sure the instructional design met the different adult learning styles, made sure
97		it worked in virtual environments, made sure it's highly interact, lots of
98		activities, lots of role play, lots of knowledge checks throughout to keep the
99		learners engaged. For management role, scheduled the meetings, worked with
100		the vendor, worked with technology team for SABA to make sure the material
101		were loaded properly, made sure the registration and invitation went out in a
102		timely manner, collected the date from the assessment and shared with other
103		team members. I did some budgeting, I always had to refer to the budget year
104		to make sure the work group was doing within the budget. If I needed more I
105		had to request it or borrow it from another area. And made sure the invoice
106		went out, or to say the invoice was paid. For the developer's role, I developed
107		some of the graphics, the charts, the PowerPoint that was loaded into the
108		system, the final evaluation and knowledge check questions, the role plays
109		even some of the graphics for the role plays.
110	Q11dvi	What software and services were used?
111	A11dvi	PowerPoint, Word, Excel, SABA Centra (the development, implementation
112		and delivery tool), Adobe Illustrator, Photoshop, Flash, Adobe Acrobat, Web
113		access is very important because we recorded the virtual classes for those who
114		missed them and some reading assignments accessed online. The classes were
115		delivered at SABA Centra
116	Q11dvii	What hardware and devices were used?
117	A11dvii	PC, headset, that's probably it
118	Q11e	What were the outstanding features of this project?
119	A11e	The subject matter expert was well known at his field. Another thing about the
120		SME is he spoke the language of the people who attended the course from
121		India and he knew a lot about the culture, so that made him very …they
122		accepted him and they appreciated him. Respective I should say too they had
123		for him. Another outstanding feature of it was the interaction virtually, like
124		whiteboard, scenarios we created, they were very engaging. We had role play,
125		we had students got involved in the role play, they worked through the role
126		play during the session, and that was one of the troubles with virtual learning
127		is making sure students are engaging and not multitasking. So we asked them
128		a lot questions using white board tool; we got them to share some of the
129		questions using text chat, and shared some of their stories. During the class,
130		we talked about some of the reading chapters assigned outside the classroom.
131		In summary, the excellent SME, the interaction with and among students and
132		engaging them were the outstanding features of the project.
133	Q11f	Did it occur to you that you wish to have done the project differently?
134	A11f	Yes, like the audience size. We had large audience from 20 to 100. I would
135		have wanted to stick to smaller audience so it is easier to track their progress.

Because having 20 or 30 people responding in text chat, keeping up with that was very difficult.

Q11g What were the solution(s) to the challenge(s)?

A11g We had two facilitators, the SME and myself, plus we had a technical support, so actually I did some deliverers as well. So I could keep track what was coming in the chat and reminded the facilitators and say, "Hi, did you see that comment?" and such and such. Help out as a team was our solution back time, I would have wished to schedule more smaller sessions, ideally. Another challenge was the time difference, about 13 hours, we had either to work either early in the morning or late at night. And part of our audience were also in the west coast, that complicated the Indian situation further. So the audience in three different time zones had to compromise. And we scheduled sessions at different time, trying to help that.

Q12a What specific knowledge, concepts, and ideas that helped you?

A12a Studying about the virtual learning, how to keep audience engaged virtually, like what kind of activities, what frequency of activities, and just basic adult learning styles, for even like for self paced learning, some of the courses were recorded. And then of course just basic instructional design theories, like ADDIE model.

Q12b What soft skills did you use?

A12b Communication skills, especially culture communication skills, project management, team building, problem solving and decision making. Hard decisions like whether or not to do a large format course or trying to break into smaller ones but spending more money, budging issues to around that so how frequent to offer the sessions, what to do when the enrollment was low, people didn't show up for the class, what vendor to use.

Q12c What hard skills did you use?

A12c Definitely PowerPoint, some graphic knowledge for presentation and storyboard, Excel using the Spreadsheets, for tracking and project management, using SABA as well. Have a high level of knowledge of LMS. For the designing part, knowing the process, ADDIE model. Understanding culture element is important too. We need to consider such as the way the graphics portrait, we had a team reviewing everything both at the US and India, so we are not missing anything near. And we decided in the beginning it was in our strategy that we are going to be forth right about things, instead of being beaten up by poor strategies, how can we improve culture communication if we do not talk about what's happening. Researching on the subject helped as well, I read some books and did some research online. Having a SME being an expert, met the author who write about different cultures he also helped educating me.

Q12d What attitude did you realize that was helpful for the success of this project?

A12d Being open minded, and positive. Because it was culture communication, you had to look past from the negative comments you heard from people your target audience, had to understanding why they took the course. And by having that background education and research advance I did, I got an understanding where the attitude came from. So my attitude was to help

people to get to the new point of understanding that the reason why they had it was because they didn't understand. We told them that by taking the course we hope you will have a new understanding and you will see things differently.

Q13 Which year was the project? What do you wish to have known that you didn't know back then?

A13 2009. I wish to know back then about something about the virtual learning environment in SABA. At that time the virtual synchronous learning was just really starting to take hold of a lot of companies, and there was not a lot information about it. So some of the research done earlier on how to involve your audience or too less tools tell you if someone was on task, some of things now you can text check finding out from exercises…some of that info become easier to find on the web and research.

Q14 What are the other knowledge, skills or attitude which were not used in the above project but you used in other Web Based Instruction projects you led?

A14 Can't think of anything off hand right now.

Q15 Assuming you are hiring a person as a beginning instructional designer in Web Based Instruction, what skills are you expecting?

A15 To understand, to be able to identify and apply ADDIE in instructional design, to be able to internal assessment, tying the initiative learning with business outcomes, to have a basic understanding software if necessary in this case is SABA and PowerPoint, in another case might Dreamweaver and HTML, to have some team skills, to show signs they can work on a team. Communication skills and writing skills should be essential.

Q16 Assuming you are hiring a person as an experienced instructional designer in Web Based Instruction, what skills are you expecting?

A16 I would expect consulting skills you know performance consulting skills, the ability to tell whether it is training need or business need to be addressed, front end analysis, of course the ADDIE model application, project management skills, everything from the first identified in addition to better communication skills, project management, maybe team facilitation not just being able in a team. And then probably more programming skills like better knowledge of the software and technology needed for development. I hate to say I expect more hard skill from the experts because it would be more likely I expect that from people in the middle. But if I answer the questions it is written, then yes more hard skills. And more a manager, or a leader of a team, probably not as many hard skills than soft skills. The project management skill is important so that they can get the project done, so they had experience with the tasks, what mistakes not to make again, what are some of the best practices, be able to lead the team to get the project done on time. And also be able to gain the support needed from the stakeholders to ensure the project successful and supported throughout.

Q17 Which direction do you see Web Based Instruction is heading to?

A17 Well, I hear a lot of people talking about, and it is pretty evident on the web as well, like HowTo, YouTube, that the general people start developing web instruction materials now. Like SMEs doing on their own and people relying

on that. Like myself before buying anything I go online and I read comments, postings and product reviews and such, so I see pretty much it is driven by the novices, developed by the novices. But for the formal learning like we do for school for business, I think we should be slow to keep up with that trend. I might use it, informal learning, as a support, but I don't see relying on that. There is nobody monitor it, nobody is looking at whether or not it is true instruction, how and if that person is an expert. Sometimes you don't know if you are learning when you are learning that way. I really not feel threatened to see instructions designed and developed by non professionals, maybe at a point I was, but I really don't because I think to get to a point where you can really design instruction to meet the learner's needs, you really need experience, and I don't think that piece is ever going away. The way we involve human race in the planet, the global economy, the learning is going to become more and more technical, just going to be at faster pace we need to learn, and it is becoming more difficult. So we are always going to need sound instruction designers, we are not going to rely on general public on everything

Q18 What do you think an instructional designer should do in order to keep up with this direction?

A18 I definitely keep in touch with former colleagues, I did a lot of readings, I sometimes attended seminars and meetings, I did a lot research on the web. Some general browsing, some just on the nature of the projects I am on, sometimes do a lot of benchmarking of vendors, like the top 125 learning initiatives every year award on training magazines, to see what other companies are doing. If you keep in touch with other companies are doing, gives you some ideas on the trend, gives you some ideas what sort of things you can do.

Q19 Anything else that was not covered in our conversation but you think is important?

A19 Yeah, LinkedIn is good, the social networking with LinkedIn, Facebook. More companies are getting on the web too, that gives you a chance to network professionally, and to join groups that are key in your interest areas. They no longer need to go to seminars at Orlando, you know you can just go to LinkedIn and join different HR or talent groups there in your focused interest areas, read their blogs, get involved with what's happening on the web, what's happening with social networking. I am in ISPI.

(This concluded this interview)

Transcription of Interview 004

Q1	Good Afternoon, thanks for taking time with me. Can you tell me your current job title?
A1	I call myself an instructional designer
Q2	How long have you been working in the current position?
A2	Over 20 years
Q3	What's your age range: 25-35, 36-45, 46-55, and 56 above?
A3	I am over 56
Q4	Would you say you are actively involved in instructional design?
A4	Yes, I am still working. There are still projects on my desk
Q5	Are there any other positions have you held before, that were related with instructional design?
A5	I was a computer programmer and I also taught computer programming in a high school for 5 years. So I fell that my teaching coupled with programming put me in a good position
Q6	How many years accumulatively do you estimate you have worked in design/development for WBI?
A6	Probably over 10 years right from when I started and I got into it. Most of time I was the lead person of those projects. Sometime there were other people work with me and sometimes…I have an instruction designer work with me and because my programming background, I do the programming for web base development. Sometimes I do both of them. Sometimes they want me to develop because they know that I know what can be done on the internet…but I turn that to the programmer. So it is really from job to job.
Q7	In those WBI projects, how many years accumulatively do you estimate have served as a lead instruction designer/developer?
A7	Oh, at least for 3 years, I have worked as a main designer/developer. Probably have a lot more.
Q8a	What's the major of your bachelor's degree
A8a	My bachelor degree is computer science
Q8b	Did you have postgraduate education: Master's, or Ph.D.?
A8b	My master degree is Education and Instructional Technology
Q8c	Have you had any other training on instructional design?
A8c	No that is it. I don't have other certifications, sometimes I would take course like I am learning Lectora, or might have online tutorial but I haven't gone through any other…education per sa in the field. Those tutorial usually are free.
Q9	What's the business nature of your current organization: business/industry, education, government/military, health care, independent, other?
A9	I am self-employed. I work anywhere from automotive. I work for all of the automotive companies in the area to museums and small companies or corporations that might want something done. I always learn something new.
Q10	What's the estimated size of the organization you are working for?
A10	It is myself and whoever else…sometime I brought in as a team person. For example right now I am working with a company, a virtual company. So, my

project manager is in Ohio, I think. But the person who does the graphic that I am working right now is in Rochester New York. Everybody works from home and we do everything by conference call. They have cloud sites where we put stuff up and somebody else can put down to share it. So it is really to me very innovative to do it this way because other companies would like me walk out my house but I am local. So they want me for meeting not by phone.

Q11 Can you tell you a Web Based Instruction project you are very proud of or got highly recognized?

A11 While I did one project for a part distributing company, and the part distribution company, they have to pick up the parts based on the tickets that they have to pack them so that the dealership could get the correct parts. And their pick rate was very low, a lot of mistakes. So they called me and I did an instructional design and I did a programming for it. I had one another person in my team. That was a liaison person with the company. She is also an instructional designer person so we did brain storm a lot. What we did was, first of all, we made into a movie. We took one person that was very good at their job and we video tape them doing the process the way the process should be done. It took long time to do it because it will be like, Ok, stop there so that we could get a close look at the hands, the pick card, or the bin and showing where the numbers were…because this was where the mistakes were usually happened. Transport the number or something and picked the wrong part. So we did that and then after they watched this, we also turned it into a game…and they will get 10 picks randomly and they would have to go on the computer screen know where they would go and which one they would pick, and whether they would pick it into a box or a bag and all the nuances that were part of their job to see if they can get a high score. We posted it out on the company's website that they have their own LMS and they have offices all over the country. So everybody could see it. And it went real good because we had one part distributing center competing with another one to get higher score in the game and then it went back to, you know, there was transform the knowledge to their job because all the sudden their rates went up and they were making less mistake when they were picking the parts. So we were really proud of that one and the company loved this one and on the first day they did this, the supervisor was like, "Oh this is the only computer playing the game, oh they constantly playing the game try to beat another parts distribution center. I am like, "You don't get it. Let them do that." Then they went to see the result, they were like, "Let's play the game." That we were really proud of. We were able to put something together that was in gauging for. Because they were guys that, you know, they were you know… "What I need to learn for while we know how to put a part…" We saw the performance improvement instantly, it was real fast.

Q11a How many team members in the project?

A11a while there was another instructional designer and me…I did the programming and then fortunately and unfortunately I can do video so I did video for it. I did video myself which saved a lot of money. But we had the corporation having people of the part distribution center. So even though they

didn't actively play a role of design part of it, they played a role as far as being such a manner as an expert to tell us what is important and then the one person that we video taped doing the whole process. So there are probably 5 all together on the project, including people from the client side.

Q11b How long did it last?

A11b 6 months. This was a long project. I worked on it pretty much every day though it was not exclusively. But it was pretty much. I mean when it was done I was glad.

Q11c What was the project about, was it about how to complete a step, process, use systems, or how to perform physical jobs, or change attitude/value?

A11c It was about process. Yes, it was all process, when, where you get your tickets from, how to read the tickets, where to go to get your parts, how to bin the parts, and finally how to put everything together to ship to the dealership. So it is about process.

Q11di Describe the project in a very high level (the process by stages)

A11di While we went through all the stages. We did the…they came to us, there is a problem, we did the analysis, then we did the development on that, then we design it first and we have to get it approval, then we designed it and we did the whole ADDIE process that is the only thing we follow. That was the ADDIE…There was an evaluation at the end when we started pull all reports to see whether their pick rates were up and up where they were. So we were able to see it because they were able to pick faster and we were able to see it because the errors went down. That were when the supervisor said, "Go play the game some more." They wanted no errors. During the course of our design and development, to refine the design or content, typically we did story board. We always done story board and then we take it to the client, we say that this is what we are doing and the client would say, yes or would you, oh we miss something here so we always go back and forth. Sometimes the design part is the longest part because we want to make sure it is exactly what it is before we get into the development. But we always consult it with our client through out design. Sometimes even during the development we are good as so far. Okay this looks like what you want… So I did both formative and summative evaluation at the end. We had a third company to do the implementation. They were the one that's responsible for the LMS. So when I am done with something, then I zip it and sent to them. If there is any hook that needs to be put in between what I wrote and they need to approve then they need to send that information so that I can put the code into the program so that it cock it each other and then they do all of the implementation part and put into the web making sure they can sign on and making sure it collect the right data…because this company, every time somebody took a course, it has to be recorded in that person's personal log when it was passed. They never want a score but just a "pass" or "fail". That is the another company. That does their part of the job. So we just pack the whole thing and ship to … and they were launching it.

Q11dii Describe the project in as much low level (steps, tasks) as possible

A11dii while the first thing that we did with another instruction designer we did was …we spent a couple of days in the parts distribution center and just shadowing with people so that we could understand what they were doing. We talked to the supervisor to try to understand with the wholes, which parts were the people missing the most so that was what we did first. Then we brain storm to come up with how we are going to do this. It is not like a dry. Then we decided to use video aspect of it so that we could, we were shadowing. We could video tape somebody doing the pick process but we have to identify every type of part that they could pick and also every way that they could be packaged so we end up with a grid that says, there are so many parts go into a bag, so many parts get tied, so many parts go into a box, so many parts that are solo, meaning that you just pick it up and put into the box for that person, for the dealership that going to. So we have to identify all of that and then figure it out how we are going to video tape them going up and down the aisles. Doing that where we have to stop to get close up so that they could see what was going on. Then we broke the process down into the different steps, then we video taped, we video taped so that they watch their own part then they got a bullet point that it says these are high level thing you need to remember then a couple of questions before they went on so that by the time it got done they were able to simulate the whole process and be able to identify how they were supposed to pick the parts. In fact, video shooting was the last thing that we did. We shadowed the job and they started to analysis the content. We did an analysis to the content. That was when we did the grid where we set the other stops and this is all the different way they can package so this is what we have to include when we do the actual training so that we don't miss any of the different ways that they can pick a part or package a part. So after analyze the content we started writing our story board and the video script because that was kind of simultaneous since the video is going to be the main part of whole instructional design, the instruction that we were giving to them. And as the thing we did, we got all approved because of course we miss things. I think we had about 3 or 4 versions of the story board script before they said this is good and this is what we are to do. When we released the story board to the client, we did the whole package. Typically, my experience has been to give them the whole package unless it is too big that it is module by module. But this one because it is one process even though there were steps to it, we gave them the whole thing because what we find is that sometime during this part of the process, they go, "Where is it?" Well, it is over here. So rather than going back and forth, shuffling a lot, we for this one we gave them the whole thing so that they could read through it and then see that we did have all parts in it even though they may have through there wasn't in a right places after they got done with it. Sometimes they would say, while move this over here or…but… Typically we gave them a flow chart in order to give them an idea what it looks like and give them a whole picture before start to read page by page, this is the process as we see it and here is the story board that replicates the process. It is about get content outline. Before I gave them the content outline, we did a task analysis just for

ourselves so we know what we are going to put the course for this one because we did the shadowing and we did one of the components of it where it was missing. Sometimes we don't. I mean that depends on what the course is all about. At this point we were up to the design, finished the design and been approved and it was when development started. That is when we start to shot the video, as soon as we start to do the programming and putting all the pieces together. I use Lectora to program. I'd use another one but right now Lectora seems to be the software of choice for most of companies. So I do Lectora and certainly it is expensive. I would say that it is almost $2000 if it is not over $2000, to buy though and that does include LMS. It is just for the software so that you can write the web design and instructional. I write my story board by power point. I do editing then I plug into. A lot of times I would like call it proof-read for whatever it is. We would like text on the screen to make sure that we got all the words spelt were right and all punctual were correct because I always tell people that I can design and I can program but let somebody else read it before it goes on the screen. Usually it is a freelancer that we know we can call and they can come in on a need basis and read through and tell them if it should be a coma or whatever. Once development is done, then we do have a website that we can put it up so that the client can review it and make sure this is really what they want. Which can again take anywhere from two days, to two weeks or two months because some clients are real good, this client was real good. But I had clients that they review it and they find 5 things that are wrong, they fix it and review it and they find 3 more things that are wrong, they review it then sent it to somebody else to review and say, "Couldn't you…" So sometimes the final stage of development get real long because somebody always come in and to say, "How about adding this?" No, that is out of scope. So once the client approves it, then I zip everything up the way that the implementation company tells me to, because some of them have SCORM compliant, some don't. So just tell me what to do and I will do it. And I turn it over to them and they did the implementation stage of it to put it up on the company LMS and make sure that everything is working so that the people could get credits for the course that they are taking.

Q11diii What event/communication marked the beginning of the project?

A11diii Usually in the beginning it is a lot of meetings with my client because you were doing you research to gather your information and you were talking with SMEs and then towards the end, you know, I can be sitting in my office for two weeks programming and not talking to anybody other than the emails that says the status, and that I go "Half way." Sometimes they request a status report sometimes not, depends on clients. For this client, they want to read my log hours every week. I got some client that they don't care how long it takes because they paid me a flat rate. If it is a hourly job, they typically want me to record at least once a week. So that they know whether I am on track as far as they budget for my part of the course. This client was a local in Michigan. But I have clients all over. I even dealt with people down to Australia…because we did everything over telephone, we don't need to travel to Australia. But it

was my clock it has to change so I can call them in their business hours. But I have dealt with clients in Australia, Germany, England and all is just virtual. And then it across United States. Anywhere in United States, I can have clients. Most, we are comfortable with virtual. As most of mine are virtual, I don't get sit with the trainees, those learners, so I just have to rely on… a lot of companies will have a training person as part of their organization. I just have to rely on them. A lot of time, I do my interviews over the phone, so they will tell me who…they will send me the names and phone numbers and subject of experts to call. And my first question usually is, who will be taking this training and what is the level of education? What are you expecting to see after they take the training? So that is how I know whom I am writing the training for. I had a company, telling me to make it very simple that these are the people who may not have graduated from high school, so keep the vocabulary to one or two selectable words, 8 grade reading level. I have had the other company to say, you know, these are college graduates. You can talk to them with…they have experience and you don't have to make real simple for them, just tell them the way it is. So, I rely on my subject expert and rely on whoever the trainers are in that company to tell me what level I need to write at. This client didn't require any documentation from us other than the project. A lot time, they may want me to turn in by material that I had, like the video and stuff like that. They want me to send out that too. Because that is proprietary that is theirs. But otherwise they don't require any type of documentation from me. As I had done works with this company before and they were saying that their pick rate is real low. They were actually losing money because if the people sent wrong parts then the parts have to come back and then they have to re-send. So they were losing a lot of money. This was why when the other automotive company filed bankruptcy …so that they are looking the ways that they could get the act together improve the product and increase productivity and stop wasting money. And so they came to me and the other instructor designer, because sometimes we work as a team one of us calls the other one in a project. And told what the situation was there. These people should know how to pick, while they don't. Of course this was the problem and when we resolved the problem, yeah we can do the training for this. This was where we start the project. Apparently they thought they need a training. They didn't know why the people were messing up. We found this often happened and we found a lot of other things that were happening that caused people to make errors, like you know they got these parts on shelves and in bins and somebody has to stock these parts. And a lot of times we were going in to pick those parts from the bin, thinking that it was the part because it was the number on the bin itself, then we looked at the parts, it was wrong part, that wasn't that bin. So we were able to identify the other things for them, like whoever stocking the shelves, they need to make sure they put in the right parts in the right bins…because…you know they picked wrong parts might not because they didn't read the number, because the part that was inside the box was wrong. So we uncovered some of those things that they didn't realized it was happening. But the bottom line was that people were

paying attention. Typically I have to sign a paper says that I am working on the project, this is what you are going to pay me and this is how long it is going to take. Most…unless I am constantly on contract…I had some companies that I work with that I am constantly on contract so they just have me once a year to sign the paper which say "None disclosure" and this is my rate, you know, I work whatever you have work for me. If it is project by project, then usually for that project, I have to sign the paper. Or if there is a new company, then I have to sign paper…that says… I will disclose anything that is proprietary, all that kind of stuff.

Q11div What event/communication indicated the completion of the project?

A11div Yeah. After then got the…it was like first quarter. After first quarter, they are able to see everything worked…because even though implemented, I know it never done. They can still come back. They can still come back, not a lot of times. But sometimes they come back, Ok, you did, it looks good. But may be this question has been. Everybody is missing this one question for their test or we got a lot feedback. There is not clear about this one section. We thought it was written well but it was not. Sometime it is two years later they call me back, "Do you remember this project?" Yeah! "We need it updated because this part of process has been changed, can you do it?" May be…usually I can but l always say it is never done until it's dead. Because I had a call as far as two years after I thought that the project was completed while they wanted it update. But I usually to me after about two months that I haven't heard anything from them that I can consider completed. So I never have a formal written documentation say that ok this project… I usually once I turned in, once we, I always want to know the results sometime afterward, I want them to tell me, it is good. I figure that I am done.

Q11dv What was your role in the project?

A11dv This role, I did a lot. I did instructional design, I did the programming, like I said I did the video work for it, so I worked a lot heads on this project. While there was other instructional designer that I coordinated, we brain storm together how do we do it. She did some of the story boarding and script writing. So that the work was kind of shared. But she didn't do the video work with video editing and video work for programming. I didn't do the project management. I had a project manager that was the company that was on that from client side and the other was the one that hire me to do the project. With automotive company, they cannot hire me directly because they have tier system. So I have to always go through the agency. So that person is responsible for scheduling and that person is responsible for scheduling meeting, to kickoff, and kind of coordinating to make sure everything. If we have problem, like may be we need to video tape and we were getting push back from. The distribution center say, no no no, we don't have time, we don't have… then the project manager will step in and talk to their project manager, say if you want it done we have to do this. So that part of it, I don't get involved with. So just for this project, other time I managed my project myself. But it was, the client was so happy to get the project that they were just cooperated with us, no problems.

Q11dvi What software and services were used?

A11dvi It was done in Lectora. I did the video work so we didn't any audio because everything was on the video tape. We didn't use any other services. It was the other company did the implementation to put it into LMS. I have EDIUS. So I use that when I did my editing for the videos. No graphics. Everything was either the video work or still shots. I can improve that video. I can design games as well in Lectora. We call it Yes/No game. It was, you know, they saw the ticket then they had 3 things that they have to pick from, there was timer going. So they had to do within 10 seconds to look at the ticket and decide what part number was that they would collect then they go to next one and say, ok, we are looking for the part. And you have 10 seconds, then how are you going to package it. You know the whole process. They have like 10 seconds for each part. If they got any other wrong, it was like…eh. That is part. We kept score. They got points for everything they did correctly. And at the end, they were scored, like your pick rate was 75%, that is bad. We are looking at 90% pick rate. So it tracked all of that. And then it took that score and then sent it to LMS so that they did their own things at LMS to be able to say this part distribution center is working for 82% and this part distribution center is working for 93% per the game. Yeah, you can do game at Lectora. Programming codes are all in Lectora. It has its own programming language. If you know programming, then you know how to manipulate Lectora to be able to do all that stuff. I don't do Flash, but I do Lectora.

Q11dvii What hardware and devices were used?

A11dvii You can work at any computer. I don't know if you have any problem between Apple and regular PC. But I have doubt. I have regular PCs. If they put on LMS. After that it is their problem. I have video camera and I had video taped and chopped into clips. It is all done on my PC. That is non-linear editing suite. I have to use video capture tool. I have a Rainier and a suite also because I used to shot video as a hobby. So I have that and it was a royal pain on Rainier. Now it was put on computer I was right there. It is like, give it to me, I don't care what is the cost. But even audio is the same way. I can do audio on my computer too by microphone…I can take any audio clips and pull out segments that went out bit or…do whatever I want really. While the record was somebody else's voice. A lot of digital. Digital record it up and goes right into the computer and I have a program that I can edit it with by Creative something. I think it is Creative Suite but it is not Adobe.

Q11e What were the outstanding features of this project?

A11e The outstanding feature of that…It did what it is supposed to do. We increased the pick rate. We increased the product…they were making the pick more productive and they were not making errors that they were making. That was we made it so outstanding. The client was very happy about it.

Q11f Did it occur to you that you wish to have done the project differently?

A11f Probably, I think that I would have it done the shot differently. Instead of following somebody all the way through, I think I would have it staged differently because I have to go to Chicago to do it. And so if I missed anything or something didn't come out exactly right…it was…ok, this is…I

am not going back to Chicago. So I think I would like to stage it differently where I could have something to start look at to say: yes…out of camera, I can rewind it and look at it but it still is not as same as when you are using it. So I would probably do it locally instead of going to Chicago. Then do the segment instead of the whole thing in two days, because that was really tiring. By the end of it, we were all tired. So I think I would want to do it differently. Because it would take longer to do the shooting but we would have each part of process nailed down before going to the next one. So if I have no choice but go out of Michigan to do the shooting, I would have take more time. Just say it is going to take a whole week. But not two days. But you see the mercy of the distribution center because that person was taken off the floor so that person was doing nothing for the two days except working with us to do the shooting. So it is very fine line there as far as what you were doing because they got rated on how many picks they do and how good they are. So for those two days, she was there and she was getting paid but she had no productivity for two days. So her supervisor had it taken into consideration so that she was not marked down because she was a star of our video. Because there is a kind of continuity with the video, so it is better the same person from the start to the end.

Q11g What were the solution(s) to the challenge(s)?

A11g Do it differently and we would have stayed longer.

Q12a What specific knowledge, concepts, and ideas that helped you?

A12a While I think part of that helped me was that I like to write real engaging applications for…so if I can turn something into a game, I like to do that. I like to make things as…so that people want to do it as opposed I have to sit there to do the damn course. I think just like a fact that I like to make things fun. Helped a lot of to make this project do what it did. It was challenging though because it was the most boring thing that you could ever think of. I think as far as the knowledge goes, the fact is that they didn't have to hire somebody to do the video work. Because that has been always concerned, "You want to do video? Do you know what is going to cost you?" I am like, "Don't worry, it is part of my…" So that helped solve the idea. Other than that, I mean, it is just like, came to us like, "Why don't we do this?" And the client bought it. Because a lot of time when we went, "Why don't we…", the client went, "What?!!" This is why they hire me for my innovativeness. But I find some companies that still too, I don't want call them zero minded, but it was like, "Oh there was learning and it cannot be fun." Yes it can! Make them want to do it, not have to do it. A lot of times I am working with persons 45 to retirement age. So we are looking resistance of using computers because they didn't grow up with computers and so why do I have to sit in front of computer when Joe can tell me how to do it. So there are a lot of times we had to dealing with to…we have to watch to make sure that it is engaging for them without being too…I don't like to use word childish, but you know, a lot times I hate to say it…a lot of times, old converters, more resistance.

Q12b What soft skills did you use?

A12b Being able to draw information out of people, being able to ask right questions. That one thing that happens a lot is that you talk to somebody you need to know about their job but they don't want open up to tell you. Because they are afraid that…they might say wrong thing, you know. This is how I have been doing it for ever. I tell them, "I am coming to you because…you know, Jim said that you are the best person to do it" But they still get a little… "What if I say this wrong. And here she is looking at me to get all the information to train all these people…" So you have to be able to make a little bit comfortable that… you know we may have to go over this 2 or 3 times because I may not get it right the first time which then give them the breathing room to say, "Oh, oh, if I get wrong while she comes back, we still have time to correct it." So you've got be able to make the people feel real comfortable that they are making the service and they are not going to reflect poorly on them if the rest of the company doesn't do it good. And that no body is get upset if they say something backwards the first time because they have been doing this for so long sometimes you don't think about what you are doing. You just do it. So I would say that is the basic soft skill that you need is to be able to get to the comfort level there so that they know that whatever you say to them or whatever they say to you isn't going to be spread around company. If you were the person in Chicago that we video taped…we had to be very very…we had to do it the way so that even though we have her single it out, it was not us who are doing that, it was her boss is doing it. She was the best one. But you still get the feed back when she was backward for the first time, "How come it was you who got picked to be the star." You think we are out of high school or grade school? But we are not. So a lot of times we have to not only talk with that person but with other people, even talk to them so that they feel they are important, it is not just this one person is important, everybody is important to make the project work. So it is interesting a lot of times when you are going to talk to them. When I do on the phone one on one with somebody, no body else knows we are doing it. But when I walk into a place and single somebody out, you can…sometimes you can affect the relations with some other people that they are working with. Just ability to be able really really listen good. Because sometimes, especially when you're dealing with people, they have their own way of saying something because they are in this shop and this is the way they talk in the shop. So you have to be able to really listen to what they are saying so that you can translate what they are saying into something that everybody can understand not just this one particular group of people that they are working on it. So jargon changes from area to area. I am dealing with company that has offices from coast to coast. The way describing something in California may not be the way that they talk about in Texas. So you have to have good listening skill to know what they do mean, this and this. If you don't…otherwise, they will pick out. It is amazing. "We don't call it that here." I am like, "Pick is pick…" So you have to have good listen skill to be able to listen…is there something…especially…if there is something in one shop, it is in one shop. Something that you are going to put out across country, you want to make sure that what you put out there just

doesn't apply this one area, you can translate so that it apply to everybody. The only stress that I will ever get if I don't get the information fast enough. You know scheduling things…and I know the deadline is coming. The manager, or the client, wants to see something on that deadline. You don't want to go back to them and say, "P is on vacation for two weeks, I haven't been able to…", you know. So that is the stress that I get. I don't get too much stress from simulating information and putting it together and producing it. I like doing what I do so it is like fun for me. I find it interesting. I mean I have people saying, "How do you know all of that?" Well, you don't know how many projects that I have worked out, I just find it fun to learn different things that are out there and how different companies work something like that. So I don't stress too much about that. You know…sometime if I am doing something innovative, I might stress out because I am not sure if the company is going to like what I am doing. It is not necessary that everybody like something new. There is still a lot of people that you have been worked web based…they still want you to read the PowerPoint, bullet point that on the slide. If you say something that is not on the screen, you'd better put that text on the screen. I am like, "We don't read to people anymore." "No, you have to." "Ok…." You have to really love what you are doing with the energy and passion. Because if you don't, it is just a job and you are not going to produce it well. But I do. Every project that I get is like new and interesting. Some of them last six months, I am glad to see them go. But I am still looking forward to the next project. You have to always think about client. What they are looking for out of this and how you are going to realize their expectations. What can you do to resolve whatever the issue is that they brought in for, whether is pick, whether is being able to. Right now is getting a lot of sales. I can see the economy must be going up because they ask me to write a lot of sales, sales, sales training training, especially something like that…um, I have done sales so many times, to be able to nail down for that company. One company may say customer relationship is the most important thing about sales; while the other company is like, "No, we are a retail company, we want to make sure they make so many hits a day. So they want me to focus on that part of the sales, how to make calls, the cold phone calls…so I would say that you have to be able to zero in what your client really wants. You cannot come in and say, "Oh yeah, I have done this. This is how you should do it. They want you be able to take their culture, their way of doing things and then turn out something that will bring them to the next level. But you have to be careful about innovation. Be careful with that. Because some companies do want you…I have one company that was hiring me every time, they need something for client that is innovative. They were calling me, "We know you because you can…oh come up something really different." I don't tell them what secretes are, what resources that I used. But I am not afraid to say, "Ok, for this, let's try this, to make it engaging, different and innovative." But there are still companies that…you know four screens, two questions, four screens two question, they don't want a lot of clicking, they don't want a lot of rollovers, they just want text text text. I am like, I go, "O—k—a--y."

Q12c What hard skills did you use?

A12c If you are going to be a strict instructional designer, you still need to know how to use Word, PowerPoint, all those types of tools to be able to get it done. Uh, just to use some, just be able to use some…you know what out there to be used. Whether you are going to iStock for you graphics, rather than to appoint somebody to take pictures and do you graphics, you have to be able to do that to present something to the client that looks good. When I first started, we could turn out Word document with squares on it, with the text to say, "There going to be the car" and "This is going to be…" because we didn't have the tools that we have today. Today, you know, you can get clip art, you can get pictures and everything to put in so they can see what is going to look like when was done. I think it makes easier but I still run across with people who, "I don't know how to do it." I am like, "Really?" So I think it is important to know how to use all those tools which are available to you. And I program also so that it gives me extra boost in the industry because they know they can count on me to program. I can do video and audio. So that is a few extra skills that a lot people don't have or don't want to have. It is not hard. As long as you find right tools, you can do it. So a lot of times they call me because they know I have those skills so they hire one person instead of three people and make it easier for them. They hire me and I find out person for them and I am only the contact person. You know I am not going to do that because…blah blah blah, but there is somebody can do that for you.

Q12d What attitude did you realize that was helpful for the success of this project?

A12d (Answered in A12b)

Q13 Which year was the project? What do you wish to have known that you didn't know back then?

A13 That project was done four years ago. It was 2007. If there was something that I wish to have known that I didn't know, it would be just how long it is going to take. So I wish I have known that it is really going to be a humongous project and, like I said that, we could have done that in segments instead of all in one time, especially the videotaping part of it, it was very long and after two days videotaping everybody was wiped. So if I get a project like this again, I would say, "I think this is going to this many hours for videotaping. Let's do it two hours a day. Or there is something so that we are not tired. This was the first I did something this big. A lot of times, it is just small, snippet, for example how do you use fire distinguisher because we are doing fire safety course something like that. This was the first time that the video was really the whole course.

Q14 What are the other knowledge, skills or attitude which were not used in the above project but you used in other Web Based Instruction projects you led?

A14 Basically all projects used same skills. What I find in my web based courses is that a lot of times they want variations and then I have to figure out whether Lectora can do it or not, or whether Lectora is going to step on itself. For example, one of my clients always wants audio. Not a biggie. And then there is another client that they want audio and they want a repeat button, so that if the person didn't hear it the first time or didn't understand so they can say it

again. While there is a thing in Lectora you can do a repeat button, except that they don't tell you that if you don't change your MP3 file to FOB, it is not going to work right. So just to add this one button took me several hours and research to find out why it doesn't working right, you know. Then I had another client that want audio and video, "But we want parts highlighted in sync with the audio and the repeat button." While I can do the highlighting in sync with the audio, but we hit the repeat button, because this isn't a Flash video, there is no way that I can reset within that screen to redo all the highlighting. So I ended up using Camtasia to turn it into a Flash video so that when they hit the repeat button, the video replay and everything was in sync. So I find the knowledge and skills that I need to build each course because everybody is always looking for something different. I had one project that they said, "We need this re-done. It is a video. It plays on computer but is just a video. We had the permission from the company that sold this CD to reuse the video. They don't have problem with that since we have bought it. We want Lectora so that the video stops when you ask questions, all those kind of stuff. So, because they called, may be because they knew that I can do the stuff with the video. No problem, just give me the CD. While the video was not a video it was a Flash. So I didn't have the source file to edit and the Flash was right in the GUI. So, here was your video, but I have all of this around it and I am like, "I don't think this can be done." Really? But I did find another piece of software that like Camtasia but different. That would take the Flash, just the part that I wanted out of the Flash and turned into a video file for me and the audio, the whole nine yard. I found it and I go, "We are good." I am able to pull out the video out of Flash and we can do it. While the client just said that there cannot be any audio. I had to turn the audio off because they are going to look at it because there was sexual harassment course. Right there on the floor were customers coming in and out. They don't want their customers hearing like watching TV. I said, "Can you put a headphone on?" "No, because it would be rude to the customers." So like we have a sexual harassment course where what has been said is key and critical. You want video but don't want audio and you want me to turn it into a course. Ok. So, I took the video. I put it into Camtasia. I took select screen shots. Camtasia can also put the little talking clouds over the heads. I turned into a comic book. So they can get the expression on the face like, "You can say that to me?" with the caption above. The client loved it. But it was like, "Oh, my gosh", you know, where am I supposed to go with it if you throw everything at me and I cannot do it but you still want the course. So I did that and the client was very happy with it and they found that it is very innovative, see it is that word again. But, yeah, it joints different skills, joints different knowledge and I have to do the research to get it done.

Q15 Assuming you are hiring a person as a beginning instructional designer in Web Based Instruction, what skills are you expecting?

A15 I would expect somebody from beginning to have a general or broad knowledge of what can be done on the internet and what innovative capabilities are and understand what else can be done. Thinking out of the

box, rather than, while this is what I have seen, this is what we can do. But it is important to know what is our capability are. When I was first started, there was no streaming video. So there were a lot of things we'd like to have done but we couldn't have it done back then. But they can be done now. But if you don't know what's coming up, what's capable being done, then you are limiting yourself as far as what you can produce for your client. So I always want somebody from beginning to know what is out there. No like, this looks like fun to do, I want to do it. But to have enough interest in it to be able to understand and know what can be done. It is good they have programming skills but it is not important. If they are going to do the instructional design though, they need to know so that they design it so that whoever is doing the programming wouldn't sit there and go, "What?" So that they can do the design so that utilize what is out there.

Q16 Assuming you are hiring a person as an experienced instructional designer in Web Based Instruction, what skills are you expecting?

A16 If they are experienced, I would want them to have done in a lot of different types of web design programs. I would want them to have done things in real time. So that they understand what involved in the and how it can be done. I would want them to have done the things that are highly interactive that they know when there is too much text down on the screen and when they need to divide the screens to do either rollovers or clips to bring up information as opposed to trying to show all of text on the screen and try to, you know, move from six words. No. So I want them to have that type of experience so that they have already done things just like that where they had process, they were able to, they knew enough to say "We can bring them back to user's process screen as menu and then they can click on each part of the process to be able to go to that section and understand what it involved in that section so that they know that things don't have to be done linearly that people can access things randomly. So I want them to have those types of skills. They have done something like that. It is past experience. I would expect them to the extent know how it is done to be able to do it. Because I have seen more and more in this business where, because the economy the way it is, people don't want hire 5 people. They would rather hire 2 or 3 people who can overlap their skills and work together as a team to get something done as opposed to, "You do this part, you do that part, you do that part and we hope to got everything working together. So the more hats you can wear, the more marketable you are, and the more you understand what is involved in that. That is not something that is going to takes 5 minutes to do. This is he part of design is going to take a whole week for somebody to be able to program it properly. Other skills and attitude…no matter whether a beginner or an experience, I still want somebody to be out there looking to know what are happening. So that when something new comes out, they go "Oh, I don't think that something would ever happen." "Where were you when it was in the design stages?" I mean, I am part of Lectora beta team so that I get to see what's going to be coming down so that when it is ready to be launched, I am already thinking about what kind of project can use it. Whether it is beginner or

expert, they need a “Can do” attitude. They need to be able to say, “Well, I have not seen this being done before, but let’s see if we can do something like that.” Rather than having, what I call a “Cookie cutter”, you know, everything you bring to the person, it looks the same. To be able to vary it, to be able to look at the client and say, for this client, we need to do this, do this. This client, it would be like… They are going to be using the computer at home as opposed to in their place of employment so that we want to make sure it can work on APPLEs as well as PCs. So their attitude has to be what’s going to take to make the client happy and what’s going to take to the client feel we are doing the best that we can.

Q17 Which direction do you see Web Based Instruction is heading to?

A17 Web based instructional training is going to be more. I am seeing it go more. Especially with everything being up in the Clouds, being able to share more stuff. I would like to see some of the courses going or you can have collaboration between different learners. We are right now you sit in or on you PC yourself. If you are fortunately enough to be able to do real time or you have an instructor there or you have 2 or 3 people doing it, that is fine. But now that we got the share out there where up in the Clouds, why cannot we do more collaboration where you are doing a group of projects even though one person is in Cincinnati, one person is in Tampa Florida…that can still collaborate, and talk and do project together, even if it is, you know, you don’t have to see each other face to face. So I would like to see more things going to that direction. What I have seen a lot of companies is everybody, while, this is me here in Atlanta. Even though I know that there is another office in Huston, they don’t affect me and what we do and I think they are able to collaborate and know…it is just like what the game was and the score was being posted…they start competing. If we can get them collaborate that way of eLearning and that would have more continuity in some of companies between workers and everybody is learning together. So I think we are going more and more towards that type we are just sitting here and on LMS. But we will have access to be able to communicate better with other people no matter where they are. Something about Cloud, while the company that I work with, we have a virtual storage place somewhere up there and when I get done with the project, I move it up there and identify who needs to know it is up there so then they can take it and review it, put it back up. We have just got one step further when a project is reviewed it is out there in a website in a real time, a spreadsheet and whoever review it can say screen 7, the text is out of the alignment. I will see it instantaneously. It is like instant notification while if I am up there, I can refresh and I will see it instantly. Otherwise I will wait until it is done. I mean, they could be doing it in the morning. But the thing is, we don’t even have to send it through email any more. I can see it as they typing it. If, you know, sometimes we got project that, you know it is like, if it due before the holiday is come. While this way, I can have the course open up on my screen and I have two computers. So I can have the other computer on with the spread sheet and every five minutes, click on refresh button. Ok, now I have got 3 more things. It is not RSS yet, but I imagine that is going to be

next step, it will be the step that will refresh itself. It is kind like Facebook, although the one that I was on was a password protected, to the point where I put something up there, I can hide it as private so that then not just people in the company who has password can see it but only the people in my team can see it. So it got little protection. I have to buy this space.

Q18 What do you think an instructional designer should do in order to keep up with this direction?

A18 They just need to subscribe to either online sites or magazines that are in their field so that they are constantly being updated. What's going on what's coming down the pipe, what's the other people doing, what's the other companies doing, attend conferences because that is where you get some of your better ideas, is finding out from the speakers, what they have done so you can say, "Oh you can do that? I can build on it?" Or "Gee, I would never thought I was doing that." You know, we never stop learning and so whether you are doing over the internet, getting paper magazine and attend conferences, you always need to, because at least to know what is going on. I subscribe to several different information centers that send me emails daily, periodically and different things happened in the industry. I can see it - Oh I need to try that, oh I haven't found doing that. Really I can use Facebook do training?...I don't think so but….if you tell me that somebody is doing it, I am going to believe you because people are glued to Facebook, but…really? But if you are thinking about it, you can collaborate on Facebook. So why not use, set up a group to use that way. So…but…if you don't keep up what's going on, you are going to find yourself, you know, out of job, producing "samo, samo" instead of coming up with different ways to do things. I am on LinkedIn and Facebook. And a lot of time, I got a lot of information from LinkedIn because of the people that I am with, they published things so…and the same with groups, they publish different articles. These are good articles to read. So I get my information that way too. LinkedIn is little bit more laid back than Facebook because nobody tells what's having for dinner, but I find that a lot of groups they do post good articles, and so it's like why I have to subscribe magazines? If you don't, get linked. I belonged to ASTD. I am still active at ISPI. Those are the two for the instructional design part. I am part of Lectora group for the programming side. To me those are the 3 main organizations. There are a lot of learning guilds, but you can get overwhelmed. But even there are a number of groups that you can join, then all you're doing is go to the meetings…you can only network so much… ISPI convention and I found them very valuable. My circumstances right now is that I cannot really go to the conventions so I don't do that, I do everything virtual, webinar. Yeah, webinars are fine with me.

Q19 Anything else that was not covered in our conversation but you think is important?

A19 No, I think you covered everything. At least I told you everything.

Transcription of Interview 005

Q1	Good Evening, thanks for taking time with me. Can you tell me your current job title?
A1	The company identifies me as training specialist, within the department the job is instructional designer
Q2	How long have you been working in the current position?
A2	Since May 2010, a little over a year and half
Q3	What's your age range: 25-35, 36-45, 46-55, and 56 above?
A3	36-45
Q4	Would you say you are actively involved in instructional design?
A4	yes
Q5	Are there any other positions have you held before, that were related with instructional design?
A5	Actually I have been doing instructional design and training since 2000, a lot of design and development of content for both the web for instructor led for blended, I also do for the standup training. Within these roles, some companies required me to manage the projects, currently I do project management as well as the design and development. So really for the past decade and a little bit more I have been pretty much working exclusively on instructional design and development.
Q6	How many years accumulatively do you estimate you have worked in design/development for WBI?
A6	About six. Some of my positions like this one and all my other jobs were about web based training.
Q7	In those WBI projects, how many years accumulatively do you estimate have served as a lead instruction designer/developer?
A7	I will estimate that as about four or five years I was leading projects. Basically when I am on a project, I am the instructional designer, the developer, the project manager, pretty much everything. The person who is my manager has a very hands-off approach. So you are pretty much responsible to get it all done. And the only time you correspond with her is when she needs an update or she reports to somebody or when you have a problem you go to her, something that you can't do on your own.
Q8a	What's the major of your bachelor's degree
A8a	It is on human resource development with specialty in Training and Development.
Q8b	Did you have postgraduate education: Master's, or Ph.D.?
A8b	A Master's in Training and Development. Same school.
Q8c	Have you had any other training on instructional design?
A8c	As far as training outside that, not very much. In 1999 and 2000, my company actually put us through a web development course, I think it is a day or two, it's been so long I can't remember, because they merged with another company, they sort of worked us through web development one on one, but my formal training was through school.

Q9 What's the business nature of your current organization: business/industry, education, government/military, health care, independent, other?

A9 They have multiple business, mainly insurance, so it is business

Q10 What's the estimated size of the organization you are working for?

A10 5000 employees, it is not global but the footprint is throughout the country.

Q11 Can you tell me a Web Based Instruction project you are very proud of or got highly recognized?

A11 One project really comes to mind because there were two separate phases, and I was the project manager and designer and developer for both phases. I was developing web based training for both product itself as well as the system piece. And it has to be rolled out not only to in-house employees but independent employees who work for the company but not employed by the company. So I had a very large audience, as matter of fact, when it comes to the time to load the training and implement the training, the LMS administrator told me, "Wow, this is the biggest assignment." It touched a lot of people. I wasn't long with the company, I was working on a part time temporarily basis, so I don't know the manager had a lot of confidence on my skills, or she was going to put me in it regardless. So it has a very positive outcome, so I am definitely very proud of.

Q11a How many team members in the project?

A11a In my group as far as the plain organization I was the sole point of contact, it was a stand up trainer who had to do a piece for the implementation. We had to come up a workaround plan because some of the independent employees did not have the computers that were able to run the Flash based simulation pieces in the training. So that individual (trainer) did that piece because the way our department is divided, the instructional designers and developers never did training, they always have to pass off to another group who does all the standup training. My team for this project consists of about 12 members who met regularly, and I was really just one functional area that support the project, you had IT department, you had product people, you have people from the claims organization, you had people from different parts of the corporation and my function was basically to support their training need. As a web person go to, really. The reason why we needed a trainer to implement is because the implementation was just for independent employees who did not have the computers to support the Flash, so we had to recorded part of the training for them. There were three courses, one of the courses everybody can get, it didn't have Flash in it, the other two did have Flash. If you were employed by the company direct, the infrastructure supported Flash or you can get whatever support from IT to run it. If you are outside the company infrastructure, you didn't have IT support. It was really a hit or miss, so there was a workaround. Initially eLearning was supposed to be the solution across the board, so it's really kind of funny how things sometimes work out. The support team, we got together regularly, we talked about the system and what will be implemented. I was representing training and development in those meetings, and there were meetings of course outside of those meetings to work with SME so that I could …and that worked well. I tried to fill the gap

and educate them about the system, product and new system it was tied into. Of course we worked with the SME to work out the scope with the design documents. This particular project, I developed in Lectora, so my storyboarding/developing was done in Lectora. I did software simulation in a system called YYYYY which is not commonly used but that was what they have available. That…to give you more details…okay, we will get to it in a few questions. In this particular company, it is pretty much how it goes: I was the only one working on the project. For the most part, the other team members were working on their own projects. The training in this company for the most part is centralized, we get requests for project, we don't go out looking for them. Like right now I'm working on a project that really came out of this customer care initiative. They came to us saying there is a need for training. We had a customer service issue related to how the employees discuss this certain information with our clients, when each some training to build the skills so for the most part and since I have been there. I had really walked home my project by myself doing the project management day to day creating the project plan and I created my project plan based on the ADDIE model since that's what I do in design and development. But at this particular company I haven't done much collaboration with other people in training and development. When there was a product team meeting, basically I went to the meeting listening to them talking about implementation, what code drop just appeared, what problems we are having. They were working with other vendors on this system, I just report to them the progress of the training if I have questions and concerns. I feel appropriate to address with the group and this key stakeholders and responsible parties I bring them up. But most of my work goes outside of those team meetings. I had to meet separately with SMEs. As far as working with my peers, our process was a little broken. I came in as an experienced trainer, so I would do things like ask a peer to review what I put together. I made it a common practice -- okay I'm going to show the client the prototype, I'm not going to develop all those in the end to show them so they can say that's not what we wanted. I had really had to do with them using the systematic approach. Having the scope design document signed off, working in such a way that it is not a half haphazard. I had colleagues who don't use the standard instructional design process and the department is actually going through some changes and I think they are trying to have us work more collaboratively, which I had done in the past. I actually worked in the team when we worked in a common course or a common curriculum at least. So this is unique in some ways. The project I am about to launch right now, I actually had the opportunity to really run the project team because when it started out our sponsor was from the call center. As I did my investigating and analysis, I found out our audience really need to include all the employees, not just this call center. So bear with people how you go everywhere in different states. Plus there were people who were employees who've been sold products. So I ended up working on to put together a working team, people who were really field representatives the field managers across the footprint and I set up all our meetings and I pretty much from our

training perspective ran this project. I was kind of the business readiness lead of this one, which is little bit different from those enterprise projects, but still in my group, which is training and development, we worked very individual.

Q11b How long did it last?

A11b The first product system phase I worked on it from June 2010 and delivered all the courses by September 2010, it was about three months. Then there was second phase, which was really another project, even though it was the same key stakeholders. It was about 3 months from my initial engagement. And they still very much need someone to do analysis and came up with the scope and then by the time it was being delivered and available for the employers to take it was about three months. The second phase was probably shorter because the system piece, the system was very similar but there were uniqueness. There was enough uniqueness so that I needed to another system training but that prerequisite wars or assumption wars you are familiar with the other system and since they were very similar. I was then going A-Z, I was really telling you what you need to know specific to the system. The product was a different product. It was a different type of products so that was, you know, new information. It probably took two months.

Q11c What was the project about, was it about how to complete a step, process, use systems, or how to perform physical jobs, or change attitude/value?

A11c The training was actually system training and it was a product itself not so much of procedure because these people knew the procedures that was related to their job. They knew how to sell this product and to use this new system to sell this project

Q11di Describe the project in a very high level (the process by stages)

A11di I started out with analysis, definitely did design and development, implementation for a large audience, you know, was assigned eLearning, put the eLearning in the eLearning LMS. I had to oversee implementation involving the standup training that was recorded, place out there where those independent employees can see it. As far as evaluation we have a standard level I survey that I didn't have anything to develop that, it's been there. There's no desire to change it with each course, this kind of stays there. And there was level II actually, that at the end of the course assessment for the product training and they learn I had to pass with 80%. The requirement was, for the first three months after this was launched, they wanted us to produce report that shows how many people had accomplished the training. The thing was, there was no limitation you can take as many times as you want it, it was compliance training. In this particular company, there was usually no consequence for not passing. No requesting yet to revise the course, not yet. Very positive feedback. My chief learning officer was told by one of CEBT that this was one of the best training they had seen from this department. Part of is because my skill set, part of is because a lot of the people in the department they weren't familiar with how powerful eLearning can be, how you can use it very effectively. So that was a personal win for me. That is one of the reasons why I decided to talk about it. This project is a big one, it was something I was assigned to in the beginning of my tenure here and the

outcome was successful. I got positive feedback from my learners. I got to know some people because there was a situation when I did a class with them. So I got to know quite a few of them in the call center quite personally.

Q11dii Describe the project in as much low level (steps, tasks) as possible

A11dii At the beginning when I was assigned with this project, they had already determined the implementation data of the system. If I remember correctly, they already determined they needed a product piece. After doing some audience analysis, it actually took me a little time to realize how large the audience was for this training because what ends up happening in this meetings is the people they…and the call center represented the staff. You know they need what they need. But a lot of times people out in the field don't get represented in the same way. So I went out trying to find out by talking to different people, okay we got all different kinds of classifications of employees. What's the difference in the job they did, what particular needs do they have, what's the commonality… and that's how I found out that all employees needed to take the training, so uh, that's how the audience got so big. And it got to the point when I was well into the design phase, I found out okay we have some independent people out there, even though we cannot police whether they take it or not because they're not employed by us, we need to make it available to them. That's how we found out about some of the system's shortcomings because I actually went out to a field office and I said okay let's see, let's take a look at the prototype and they could not run it. And there was nothing the company could do because they did not own that equipment. So that's how that was kind of figured out. But after the initial audience analysis and content analysis and basically there wasn't any existing content, what I had really was the processes that were in place for another system that was used to sell another similar product. So I got some familiar with the current workflow and I had to gauge how this new workflow was different and how was similar and that helped me to decide how to represent it.And I decided to do software simulation that's actually walked them through using the system because just doing a screenshot with callouts, that wasn't sufficient because that was a different system and the way it was navigated, the look and feel of it… even though the information was very similar, they were different navigation all together. That's so that's why I decided the simulation was the most effective way. And I ended up using a tool that was new to me because they do not have Adobe captivate or another software for simulation, no Camtasia, we have Captivate now we still don't have Camtasia, so it was interesting. I was learning that system, while I was learning this system. So that was interesting, that keeps on your feet. I tell you, it definitely does. There was a product lead and one of his reports was my main SME on the product side. She was the one who was able to tell me the rules and guideline, and how they varied from state to state so when I was actually presenting the eLearning of the product, she told me for example in Michigan, here is the rules, here is the type of product that goes under this category. So those were kind of things I actually worked pretty closely with one SME. When it came to system, I actually had access to the same test system that

they were developing in, so I could go in and do my simulations. Of course, it was unstable. There were bugs, sometimes it was down, there were spans of time when I could not use it because they were dropping code and I had to wait. And there were period of times when…if I had taken that and simulated, it wouldn't have really looked like the production system, so I had to wait for them to do something so I had to do some mocking up….things like that. It's common. It was an interesting experience in that they knew what they wanted but they didn't know how to get there. I had to educate them exactly what role the training and development plays versus the other departments because there were times when I get questions and it was obvious that they did not understand. For example, they had a vote Go or No Go, that's what they call it, on whether they implemented the system and they went around the table and when they got to me and I said pass. As your support in training and development, I don't get a vote on this matter, I don't have enough information to vote on it. I am supporting your timeframe, I am having training ready in advance of your launch, I want to help people be able to navigate the system and understand the product. So when they hit the floor and run it, they would have knowledge base. And I actually had to explain that gently in a non-threatening way to them, that we are not part of the system implementation, we were supporting the learning of the employees. So uh they got very comfortable with me after a while. And even now… because this second phase the training has been done for a while but they haven't launched yet, they may have questions about …okay, we sent out this communications to the enterprise, we just wanted to make sure that when it comes to a training dah dah dah… So they are definitely pretty comfortable coming to me when they maybe have a questions where there is a gray area and uh. I think what it is that my focus on customer service, my focus on learners makes them comfortable coming to me, whereas working with somebody else they may go to the big boss, or they may try to guess at it themselves, or may they missed the opportunity because they needed the information and they just let it slide, and maybe there's an error they needed to clean up later. I'm easy-going, the personality makes a difference. I try to let them know that if they have a question, I would try to answer even if I may not have the answer, I may help them figure out or get to the right person. You definitely, I think, when you develop certain relationship with your client, it helps you get what you need because as you know sometimes when you go in and you are the outsider that's working with them on their area of expertise, it can be threatening to some people. So if you don't handle it in such a way, either one or two things would happen. Either they would be very very intimidated by you and maybe they won't devour the information. Or maybe instead of consulting with them working with them, they would dictate to you what you need to do. So it's kind of a balance. During the design phase, I put together a design document that outlines my terminal and enabling objectives. By the way I do not use a lot of training talk with my customers. I think even in the document I changed the word terminal and enabling to main and supporting just so to sound like more like a regular person would understand. So I delivered that objectives

out, I talked about what type of training solution, which is eLearning in this case, it is pretty much all I have done. I talked to them about in this document I outlined what the reason is somebody came to you and said there was this needs, so I talked about it and gave them some background information in the design document what are the big goal is, what are the main and supporting objectives are. I talked about in this document whether or not we are going to have level II evaluation. The truth is as a company we should be doing level 3 evaluation, we don't, unfortunately for a couple of reasons I think: time and lack of knowledge from top-down maybe, we don't do it enough to see how the training actually transformed back to the job. I can get a good idea sometimes because I am working with the same person on different projects. I can see the difference. The way they responded to you shows that indeed the value of what you did, so it must be working. But there isn't enough formal level 3 evaluation, we don't go back to observe and see these skill in practice. We don't do surveys to follow-up. It's just there. The design document also includes detailed outline. So for me at least when I coach new instructional designer, I tell them this: By the time you're done was your design document, you should have a blue print for your course. So you basically are ready at the point to start putting it together based on the design, it should be comprehensive. I worked on a project, a small project prior to this one where I actually did not do the development piece. I passed on to someone else and she actually put into Lectora. She did the development work, I had a hand on it, but she did most of it. So I did storyboard using MS Word. What I find is: if I'm designing and developing it, I don't do the extra step because I don't see any reason to use Word and use Lectora. So this is what I tended to do. I tell you, as I'm developing, my design…even when I backed to do my analysis, such as the ADDIE model, it shows as linear but those work in the field know it is actually not, it is very much a reciprocal thing. So, I'm thinking about what multimedia elements I want to use. For this current project I decided pretty early on to use some audio because I want the employees to hear some successful examples of what I was teaching them. So I am thinking about how I am going to present the content pretty much from the start. I am thinking about how I would assess the information, even if there is no accumulative test in the end, I always use knowledge checks throughout the training is an opportunity to see if they are actually getting it. So by the time I am in the end of the design stage getting ready to development, I have a good idea of my multimedia elements, I have a good idea all how I'm going to assess. I probably start to collect graphic library for this project. I'm saying that because we don't have very strong graphic library. And I started creating one because there are some usable stuff out there. The last project I was telling you about, I kind of have unique stuff, so there were certain things I have to go out and buy it. We should really have a graphic repository where we can use stuff and reuse it, and do whatever is needed. Technically I have been mentioned it up till now: we technically have a graphics specialist in our department. It is good, but she is not really a graphic artist, since she is not one of those people who can give a description or sketch something out, it's

not like that. I usually do my own graphics because it is more efficient because I know the content I need I don't want to get it an animated picture something is not really appropriate when I can just go out and get something or mock up something and to do it myself. Now, with the direction the department is trying to go, I don't necessarily see it to be used more because we got quite a few instructional designers and developers and the just one graphics person, if you got to get something done you must get it done. You really don't have time to wait. Plus, there's learning curve issue. I always like to have a prototype. What I usually do is take a relative small content such as a lesson or maybe less than the lesson and developed it a prototype to give them a look and feel. We always have a template we use, so as far as company color the border, that's all set. The rest of it, there's always room for interpretation. So I always give them a prototype that lays out the instructional method, what's been used, give them an example of an assessment question, the multimedia elements I am introducing. And even though I usually will continue to work whether they have approval or not, my mind is that take a look at this and tell me what you think and give me feedback, then we can proceed. And that's how it is - the checkpoints, milestones throughout so you got to approve the scope in order for me to do the design, you got to approve the design in order for me to do the development so on and so forth. And I find this systematic process as far as you are flexible enough to meet the business needs, I think I have my systematic approach works. Usually I tried to build my prototype whatever piece in the training I am showing them. I have a shell but it functions. If there's a mouse over, it functions, things like audio and video at that point usually not. But there's a placeholder for it to show them how it looks. If there is maybe a PDF I want them to launch from our page, usually we tried to build just a few pages so it is totally functional. It gives a good idea what they are going to get. When it comes to audio, and this is the first project we have an audio since I have been with this company. We have a studio, that president he used for his broadcast. So it would be professional audio, the team of course developed the scripts. I probably wouldn't be doing the recording, we actually have the people to support technically. But I have to be there, I have to make sure the audio got put in, just to make sure the actors got rehearsal, that kind of thing. I really had to coordinate everything. Now I have colleagues who worked on projects in pairs, I wasn't close enough to know what the breakdown was as far as who did what. I think there is one lead and other supported her. I got the reputation to be good and fast. So when something needs to be done I just do it. As for animation, we don't have anybody would can pass on to. I had actually worked for a company, we did the raw in Captivate and then passed to a developer, and they did the cleaning. Currently I did all of that. If I had to really re-recorded a simulation I had to do it. With the audio, because they had a professional studio, they will do the cleanup. That's really nice because it's not your expertise. I had used video in other companies. I had support from the video department. I actually requested that… and I kind of mentioned that we signed off the scope so we

are all on the same page. So if this scope changed I could go back and say that's what we agreed on, and if we had it to do this plus this and this, it could affect the timeline and all that good stuff. They signed off on the design and we started developing, they signed off on the prototype. They signed off on the final content. Before I would do any audio recording, the script text has already been approved. And I include a transcript because the people out there who don't have sound product on their PC cannot use audio because they are in the call center they don't have headphones to use or whatever. So, before I involved those professionals who are doing audio video, the scripting has to be approved. We need word for word the verbiage. It is expected that we do all the signoffs, people do not always sign on the written documents like I signed that. So if people send e-mail and saying I approve it, I save those as part of the project folder I have that actually says approvals because sometimes the papers were get lost. I don't like a lot of papers around me. I do eLearning so why should I have all those papers. Generally before we got a final signoff on the course, we had a meeting or even maybe more than one meeting, we went over each lesson, we talked about it and everybody on the project team who is a subject matter expert had a chance to make suggestions, revisions, and correct that information. And depending on the project, and that takes various amount of time. The key signoff individual or individuals… I tell you it's better when it was just one versus the whole team…when they get the SMEs have done their feedback and made suggestions, I would have gone through it and try to have it waiting edited by one of my peers like proofreading, but sometimes it didn't always happen. There had been times when I asked somebody to do it, nobody would do it. You cannot edit your own words, but I did the best I could. Right, sometimes you looked right over your own mistake. By the time the person who was responsible for signoff gets it, the content experts had their input, there usually has been some revisions made and then based on whatever their response says, there are changes to be made again, of course. In most instances, I don't have to have another signoff, it's usually…okay, I approved this this this and this change. And some of the project teams have a pilot phase because they only want to roll out their new system to a selective few so they had the phase approach to have a training that is implemented. But from our perspective, what we usually try to do and I suggested this simply because you know we are not dedicated to a particular customer. We are dedicated to the whole company. Okay as long as this training has been approved let's make it available to whoever needs to take it. If there are some problems, something we need to change, we could come back to look at it. But we kind of like to care the customer and move on because they always have another project to deal with. We don't want to waste our resource on something that's already has been developed and ready to be implemented.

Q11diii What event/communication marked the beginning of the project?

A11diii The training management of the department came to me with …. I don't know what you want to call it because it really is not a requirement document. It's basically "This group is launching a new system, they need training" in the

email. I go to a meeting and listen to what's going on. Listening to their asking questions to the right people and getting the right information, I pretty much determine, "Okay this is the system piece and this is a product piece that we need to teach." The product piece is really a prerequisite piece to the system piece in order for them to be successful in the system training, they had to have a good idea what the product is. And that's kind of how this project was started. I do a project plan so that it keeps me on track. I use our industry estimators as much as I can because I know that we are doing eLearning there is extra amount of hours we are going to spend for every hour of training. Obviously with some projects, especially you have to march in a very tight deadline …but I am very realistic. Have been in some situations recently and throughout my career actually, again I'm really good at talking to the clients: Within the timeframe we have, here is what we can offer you. If I had extra amount of time, I can offer you this plus this. So somebody came to me and said, "Well, we got the system and it's not developed yet, and we need training, we need eLearning in two weeks". "In two weeks, here is what I can offer you. However if I have more time I could do this this and this". So I mean realistically speaking, I feel that in my particular role in this particular company as an instructional designer, I'm successful because I'm seasoned enough to manage expectations along with the design and development of the training. There is not a lot of support from our hierarchy on managing expectations. Just to give you an example, two my colleagues had a project that really got out of hand. I was not close enough to be able to tell you if it was the scope was just too big for the resources and that amount of time or if they weren't working as efficiently as somebody else might have, but I can tell you that our chief learning officer had to get involved which to me that's not a good thing if a project blew up so much that they had to get involved at that level. From what I understand, lots of hands were involved in this project touched a lot across the areas so I think in the beginning the scope was not managed well and in my opinion that was something that kind of goes beyond what an instructional designer should have managed alone, just by definition. The people and the management role was supposed to oversee that. So I think there were some mistakes to be made, to be honest.

Q11div What event/communication indicated the completion of the project?

A11div I actually had a wrap up meeting at the end just kind of summarized the timeframe, what we delivered and you know just basically let them know that we were officially done with this project. But obviously if there is question, support you need, please let at snow. So there was actually a formal project summarize document I produced and submitted to the key stakeholders.

Q11dv What was your role in the project?

A11dv Project manager, designer and developer.

Q11dvi What software and services were used?

A11dvi Lectora I used a lot. YYYYY I have used. YYYYY is a proprietary software. They actually used it internally and it was available to us since we did not have Camtasia or Captivate. It had a software simulation capability, so it's not great but it's better than screenshots and callouts. Those were the two major

ones that I used and I'm not talking about Microsoft Office, of course I use Microsoft Office. We have Captivate but I haven't really used it extensively at this company. I have used in the past. So Lectora was the big one for them. I used SnagIt, I used Paint. SnagIt editor did a lot of screen manipulation, so I used a lot. I don't have Photoshop, our graphic specialist does not have Photoshop yet, I know it's kind of a low ramp. It's kind of limiting our graphic … And sometimes I saw images I want, I might able to SnagIt and to clean it up. But as I said it's not great. And the industry that I have done most of my design and development, it's been sufficient. Most of the time if we had branched out and do more customer service training, we would need a little bit more original graphics, I think. No Flash. We don't have any audio software. Recording studio is something we could schedule to use. The department has worked with vendors outside, even to do the development, I haven't though.

Q11dvii What hardware and devices were used?

A11dvii PC is only hardware where used pretty much. And occasionally audio studio.

Q11e What were the outstanding features of this project?

A11e That it was big. It touched a wide range of audience. That it was completed in the timeframe allowed it. Like I said there were issues with the system when there is a system training you kind of need a system available. I was working with quite a few different people whom I had opinions and ideas about what needs to be done. So I was able to target with what's the audience needs to know versus peripheral things that will be nice to know but weren't essential to do the job. I didn't really have benefited of having the people bouncing ideas off the peers. It was pretty much hit the floor running, sank or swam. So for what was worth, I don't necessarily think that's the best way to do it because I think the collaboration was the positive thing. It increases widely the success and improves the product, but I'm really proud of that project because like I said within a short timeframe got it done , happy clients, heard audience learned what they need to learn, as far as I can tell.

Q11f Did it occur to you that you wish to have done the project differently?

A11f I think that if, well there is something I could control but if I had had the Captivate at the time, I think we would not have to come up with that work around where they did record the live meeting I think that it would run more on our system because YYYYY had some auditing things behind the thing that made it a little different. I think Captivate would be a better tool. There were some sizing issues related to the graphics that could be enhanced with the different software. Ah… things I would have done differently…. As the instructional designer, there's really…I mean if I thought really really hard, I could have come up with something but there's nothing that jumps out to me as lessons learned related to the content itself. I can tell you we had a separate team that assigns to the treating and the learning management system and the working with that team sometimes was a little unique because, I guess, in my mind my role as designer and developer is clear, sometimes I think there is ambiguity in other people's mind, because maybe they function in such a way that for example, if I have worked with a team and we have come up with design and we get to the point when it was time to assign to the LMS, well

the other LMS team does not really have the stake in the content, their role is to get it into LMS. And so if they make a suggestion, I may hear it and let them know I heard you. But this decision has been made and this is why. It can be tricky, I think, when you were working with people who on the change and who don't have the wealth of experience in that particular field, their expertise maybe isn't about getting the job done and did efficient and effective. It's more so about this has always been how we've done things. Mitigating that, for me it's really not a problem to mitigate it, but people are people and sometimes people don't like changes. Some people don't like to see things being done efficiently because it bothered them, right, the ideas that their professional field as well as the credential plus experience were threatened to some people, sometimes you are underappreciated. So I don't have a lot regrets related to the role and performing now, but I learned a lot of things over the year through making mistakes through you know naïveté. And I kind of take that lessons and now I learned my lesson from certain things – certain things you know that I would do much better now than five years ago or 10 years ago.

Q11g What were the solution(s) to the challenge(s)?

A11g If I am working on a team and my role is to do the training, I have a consultative approach. I respect the expertise that all the people involved bring to the table. I don't try to prove "I know all this about the training and dah dah dah dah dah". I try to bring people on board and make them feel that we are working together. And generally with customers, that's a very successful approach. So in that respect I feel like it's usually a pretty good situation. It's binding. When you work in that department where skill levels were all over the place because some of the various things that make you affective with the customer don't necessarily make you popular with peers.

Q12a What specific knowledge, concepts, and ideas that helped you?

A12a I think for me hitting the grass for adult learning theory helps understanding that adults are really big and what's in it for me, and they not just wasting their time with training. They wanted to affect their job and they want to be relevant to them. I tend to lean toward the constructivist view of learning, I don't think there were empty vessels to pour things. I very much think that when it comes to adults, the connection they make to things they've already known is very helpful, that I can connect to something they are doing in their job that I try to teach them helps transferring the knowledge. That's one of the big ones for me. Attention span and not overloading them. I've seen some eLearning and for job aids for that matter, there are eye charts. I'm thinking people scanned the window when they look at the Internet. You cannot load the page with words and content. You cannot try to teach 10 things in one-page. So I keep cognitive overload in the mind. When I'm doing any type of training, that especially with the web, because the audience is not even looking at it like they are looking at a book or manual, so those are the big ones. The tone, that I take, whether it is using active voice and trying to personalize it, or whether it is using a graphic that's representative that supports what they are learning, because I think multimedia really should

support learning. I don't really use a lot of eye candy, a lot of spinning and moving on the page just for the sake of doing it. I actually had colleges who tend to disagree, but usually those were the people who don't understand how we learn how things can actually be distracting. And reinforcing what I've taught with activities, give them a chance to apply the knowledge, and I don't mean just multiple-choice, I do short assays and things like that. Those are some of the big ones for me.

Q12b What soft skills did you use?

A12b Consulting and good communication, keeping people in the loop, being very approachable, being very collaborative, letting people know that I am there assisting them and helping them. And somebody maybe talk to me about something and I may know it doesn't make a whole lot of sense. In my mind, I might be thinking that's just not going to work. But the talking to them in a way, "Okay we can consider this, here is the option." Really making people to feel that I value their contribution. Also letting them to know that I am there to assist them with the certain set of knowledge and skills and that this aspect of our project I got it under control, it's been taken care of. You don't have to trouble yourself, to worry about training because we're here to assist you with that. Because sometimes you have clients that were used to the situation that they had to put something together, that they had to figure out on the … maybe even they've done the training. So letting them know that time that I provide the support that is collaborative effort. And being open, positive, I think all the things making it successful in the field. As for the project management skill, there has been times when…you see because of the nature of the way my department runs, there were maybe times I feel there was too much lag because I worked pretty fast and efficiently and I don't rush, some of those politics too though you know…if I can develop two courses in the length of a time it takes a colleague to maybe do half, and if you look at it, it is like, well, she actually got more she is developed and you still here, I think sometimes things are assigned based on politics, 'cause like I said, since I've been there, I just thought about it as I am talking to you, in less than two years I had like eight major eLearning plus a few small ones, plus coaching an intern, and I wasn't out on sick leave last year even. So, I mean I have done quite a bit but to me, if I got to be there, I'm there to do something, I don't just sit around. So my toolkit, my skills allow me to be efficient. I know that some people get caught up and they may get stuck in the analysis phase and they cannot move. I don't have problems working with a little ambiguity as long as I'm getting information, I'm moving forward. I don't necessarily have to have all the pieces of the puzzle to move. But we were trained that way. Without the training, I can see where it can be a problem.

Q12c What hard skills did you use?

A12c Like you said writing, learning the software you are training, using the software to develop. Yeah definitely presentation skills. Well, definitely the ability to learn the new systems. There was always training, the ability to learn new information, being a quick study I guess. I think you learn what you needed as you go.

Q12d What attitude did you realize that was helpful for the success of this project?

A12d Being open minded, being engaging. Flexible, confident, confident without being arrogant.

Q13 Which year was the project? What do you wish to have known that you didn't know back then?

A13 2010. Since it was so recent, I cannot really think of anything that I didn't know back that time. The only thing that bugs me about this particular project is that since it was eLearning, the fact that we had to have a standup trainer involved was troubling, but again because of the nature it was not something I can change, it's an environment thing.

Q14 What are the other knowledge, skills or attitude which were not used in the above project but you used in other Web Based Instruction projects you led?

A14 We talked about it a lot... See that's just the … If I had talked about a project from the past, there is probably a lot that have told you that project could be improved upon. Since I have talked about to you recent, I almost felt that I used the resources that I have had to the best of my ability.

Q15 Assuming you are hiring a person as a beginning instructional designer in Web Based Instruction, what skills are you expecting?

A15 I would expect them to have what I call a standard instructional design process, ADDIE probably, because that's kind of our standard process. I would expect them to have good communication and writing skills. I would expect them to have knowledge of Captivate, Lectora or some of those tools like that, or Articulate. I wouldn't necessarily to have them to have them all but at least one of those. Honestly, I think, because this is because I see things both ways I lean toward… I would expect them to have a bachelor degree in the related field. I don't want somebody who just falls into a position because they've been there for a long time and I see that I see there's a problem with that.

Q16 Assuming you are hiring a person as an experienced instructional designer in Web Based Instruction, what skills are you expecting?

A16 All of the things I mentioned before, plus several years of experience, experiences in designing and developing using tools like Lectora, Captivate and maybe Flash. I know people used to use a lot of Flash and stuff in the past, but… they would have to be experts of those tools because the industry has changed, but I would expect them to have experience… They would have to in the interview convince me that they had the business acumen that they knew how to consult the client, and they knew how to outcome the obstacles and have a plan B, and definitely at least a bachelor's degree and or a proving track of record. Ah…without the education 10 years. With the education I would say 4 to 5 at least.

Q17 Which direction do you see Web Based Instruction is heading to?

A17 I think what I'm seeing is that they are looking for instructional designer to be a designer and developer, very much so the days of the hard coding Flash developers I think are starting to go away. I think that you need to have project management skills because these things getting leaner and meaner. I think people are realizing that in some cases because I have been with

organizations that are realizing that the big top heavy or middle heavy maybe, their people in those roles are not adding much value because I think most instructional designers were successful are very self-directed and very much have to manage the tasks that they are doing. So I think that understanding that this is the profession and there is art and science to it, I think that's kind of what the industry is heading. I think there is always somewhat blended, I don't think we would to purely eLearning. I also don't think that people are going to go back as much to the classroom training as it has been in the past. I think there will be a blend, and I think people who are able to work with the blended solution and to use the technology work across geographies are the ones to be most successful. As matter of fact, have I ever had a situation where all of my audience were just in Michigan? It's very rare. And even when I was working at a law firm, we had a couple offices outside Michigan so I've never really served to just like a small in-house group, it's usually pretty broad. I was taught as a young professional the importance of cultural diversity and realizing that, for example, maybe some of the idioms were used in American aren't appropriate to incorporate in training. One of my early companies actually had a course they designed that we had to take global English. One of those examples was when General Motors sold a car in Spain called Nova, when Nova means "Doesn't go" in Spanish. So something to think about. You want to call a car nova, which means doesn't go? So, things like that. I was actually one of my early companies was a very, very good learning ground, I haven't dealt a lot internationally as a trainer but I worked with audiences who have backgrounds that runs again and one of my research specialty is actually diversity. And actually I wrote a chapter for textbook on diversity this year. So for me as a training professional it's something I consider. I know there's diversity preference and learning style. Anything from time management to, you know, eye contact, communication styles. So those of the things I keep in mind. It's not the easiest thing in in the world to take when you are writing, it takes into account certain things like Nova example. But when you are dealing with audiences in eLearning, when something is written, you can be interpreted in different ways, you don't have that immediate feedback, whereas in classroom there were facial expressions, that look of "I am not sure", the things you can talk out. So in that sense, we are at a disadvantage when we have an asynchronous learning. That's just kind of nature of it. And we try to do things to make it neutral. But sometimes neutral doesn't touch everybody. So that's one of the reasons why I don't think the class room training would ever go away totally even if it is all WebEx, even if it's all virtual, we are not all together in a classroom, which to some extent we still do that too, it may not be as broad. So I am excited about the future of the industry, I'm cautious though, because we tend to be the first thing that's cut in times of trouble. I know myself, my own income my salary has decreased as my skill set, education increased. So you know it's not the easiest field but it's rewarding for me.

Q18 What do you think an instructional designer should do in order to keep up with this direction?

A18 I think that we should be involved in the professional organizations. I think we should weave in researches, you now, as we should be in the position to educate ourselves. I can feel it in this field if you're given an opportunity to go back, it helps to be educated to be an expert. I think all of the things really validate what we do. Just like you wouldn't want to a lawyer litigating who didn't have any professional background, same kind of thing. Actually, I am a board member of GDASTD, I participated ISPI. I'm not as active but I do participate. And I belong to lots of blogs such as eLearning blogs. Lots of things like that. And in groups at LinkedIn, professional chats, networking I do a lot of that. So I try to keep informed in that respect. I think that's important to be connected.

Q19 Anything else that was not covered in our conversation but you think is important?

A19 I do think that there's definitely a difference between training professionals who are skilled depending on background and people who just falling to positions maybe they have been around for a couple of years and they were put into the position, I think there's definitely a different approach, different success rate, and I really appreciate when I see a person who has credential and experience behind them who can collaborate with you because the differences are obvious. I do agree we need some formal education. Actually, at one point I got sponsorship, but I took some time off to finish because I was at the point that if I didn't, I wouldn't finish. So that was really important for me to finish so I took the opportunity of substituting teaching for a while which was really really flexible. And I did a graduate assistantship, and that was interesting. That actually gave me opportunity to do some writing and really proud of getting published at this stage this level. So that's good. 'Coz this is not an easy field to me, it's an interesting one. So we will see.

Transcription of Interview 006

Q1	Good Evening, thanks for taking time with me. Can you tell me your current job title?
A1	Yes, at this point I am not currently working, however a few months ago I was a principal training and development specialist.
Q2	How long have you been working in the current position?
A2	For five years, just short for five years.
Q3	What's your age range: 25-35, 36-45, 46-55, and 56 above?
A3	56 and above, as of December.
Q4	Would you say you are actively involved in instructional design?
A4	Absolutely yes. As I said just a few months ago I had been employed as an instructional designers for about 20 years, 15 of them were in automotive industry. And I also have remained active in professional organizations. I have just completed a term as a Vice President in Communications for international AECT. And I am also a member of Michigan chapter AECT. And I attended other groups, such as ISPI and ASTD.
Q5	Are there any other positions have you held before, that were related with instructional design?
A5	20 years.
Q6	How many years accumulatively do you estimate you have worked in design/development for WBI?
A6	In web based training, I have been involved in web based training probably since 2000 so I would say 11 years. I think that's when technology finally got easier to work with. And Authorware had evolved into something much easier to use. And I think corporations started to believe in that about that time.
Q7	In those WBI projects, how many years accumulatively do you estimate have served as a lead instruction designer/developer?
A7	Oh, alright, let me see probably, I would say from probably 2002 through 2011, so about nine years.
Q8a	What's the major of your bachelor's degree
A8a	My bachelor's degree was in English and history from Michigan State.
Q8b	Did you have postgraduate education: Master's, or Ph.D.?
A8b	My Master's degree was actually in healthcare administration from BYU, Brigham Young University. My PhD was instructional Design from Wayne State University.
Q8c	Have you had any other training on instructional design?
A8c	Other than the degrees I think that the doctorate was probably all in incumbency. When I was in AAAAAAAAAA, they would offer us periodic seminars that they would bring in house… different experts in the field, I remember, David Jonathan came in, John's ARCS's model from Florida State… I'm blanking his last name, kind of a lot of big guns would come in to do seminars for us on their areas of their expertise in instructional design, John Keller, that's who it is.

Q9 What's the business nature of your current organization: business/industry, education, government/military, health care, independent, other?

A9 Most of our work were for outside clients. We do have a branch in our Dallas office to develop internal training, our security training that type of thing. But no, most of the businesses were for internal clients. And GGG is the biggest client, NNNNN was one of the biggest healthcare, they had a huge contract with aviation association. We did a big contract for a military in United Kingdom. That it was a project that went for a couple of years we actually had a team in Britain doing that. And also we have been doing… we rolled out 300 course curriculum for a technical institute based in United States to train automotive technicians. So this is really a multi-setting business.

Q10 What's the estimated size of the organization you are working for?

A10 I want to say when business was really good, we were probably in the Troy office 400 people and another team based on Dallas... I would say our business around 1000 in total.

Q11 Can you tell me a Web Based Instruction project you are very proud of or got highly recognized?

A11. I think I was the lead, one of our healthcare clients wanted us to develop a new website, it was their training database. They developed an entire website through which they would do registration training registration that type of thing. So it was a big software project. It was a newly developed software and our company was to develop the training for that software for web-based training.

Q11a How many team members in the project?

A11a It's just me and another developer, an excellent developer. You know what, I would take that back. I was a lead for the project, S was our lead developer. And we also always worked with a graphic artist. There was a media developer that developed all our Flash, and we would always had …there was outside team we would bring in, we would bring in outside talent, each screen would have voice over associated, so there was actually outside talent. Plus we also had in house audio team where we had audio technicians who would recorded. And then after that, because this is a web based after the instructional designer, the media developer, the graphic artist, the audio...after all of that work was married, a course was loaded into LCMS. And then after we published out the course, we would've of course… Once the course was completed and published, we would go through and proof read and do quality assurance. But then there was also in our office was a test lab, and those people what they would do …we would give them a course, they would load it up to a prototype LMS. And they would take the course and we would receive a quality report back. So that was very complete. Yes this one we would have WebEx conferences with our clients… For this client, there were several SMEs. There was actually an in house person who was able to provide a lot of the content to us, but then we would have…after the interview with T, and obtained content… the initial interviews with T, that was our analysis. Then we put together a design document screen by screen how we anticipated the course and then we went to the client, and they had a team, I

want to say two or three people who would attack the submitted document, and it was their job to provide revisions to the design and doing signoff. So I would say that was probably four subject matter experts. That was me who was doing project management.

Q11b How long did it last?

A11b It was very, very fast. Probably the course, I want to say probably 45 minutes long. It was a smaller course by the company standards, they used to do a three-hour WBTs, which I don't think that was wise. But this course was about 45 minutes. And we were charged to have it live within four weeks, from beginning to end. That was what the client was initially demanding. However, the client, fortunately for us, the clients software development team delayed so the course I think in its entirety all the way through our process loading it to live, I believe we had it completed in six weeks. And this was my experience with software training is that although the clients wants the training development as the software has been developed, and they keep changing it and usually delayed, and that's what it happened.

Q11c What was the project about, was it about how to complete a step, process, use systems, or how to perform physical jobs, or change attitude/value?

A11c It's about a software system

Q11di Describe the project in a very high level (the process by stages)

A11di When I led a project, I pretty much tend to follow ADDIE model. Understanding that it is iterative, that you never ever through with analysis and design, you know, there is always more revision to do. But yes okay the process we followed, after I was given the assignment after the team members were assigned to me, then I met with the in house SME, who was also the client interface, she worked with the client in a daily bases. And basically we had a few analysis meetings with her, to understand from T exactly what the client wanted. For analysis, I always asked at the end of the this learning experience, what the people is supposed to know or do. And so I just let T started talking, okay people need to know or do at the end of this experience. She talked for a while, I was able to identify the basic categories of information, which then became the modules…yes you know. So we identified the basic categories which were modules, and we started drilling down. She was able to show us the prototype software. We just based on the each categories of information, registration….I don't remember what exactly the content was, say it was the registration of the students was in one module, then we went screen by screen through the registration process. We kind of flowcharted the process, identified the screens we would want to train, and then we started talking about the interactivities we wanted on each screen. We…it was a toss of between using Captivate or using Flash to teach the screens. We were led to go with Flash because we were in such tight timeframe, our media people…it was easier to pull one of them in, storyboard out the Flash and do it that way. So I guess uh…we combined analysis and design, was just iterative. Yeah, you know how it go, you get your basic categories, see if your client likes it, then revise the design document, send it back, and then we make sure we had an official sign-off from the client on the

design before the actual storyboard…I think we might start storyboarding without the design, but we sure we didn't start Flash development without the final sign-off. Yes, they did review the storyboarding, the storyboarding was very easy because our design document was so complete. So storyboarding was fine. This project had a little complexity to it, I might said it's easier to use our LCMS. For this one, we didn't. XX has a ...I call it factory model of instructional design, meaning it is very lock step and everybody on the team knows exactly what their role is because we've done it so many times. Personally I do not like it because it prohibits creativity. It does not always meet the customers' needs, I don't think very well. However, that's the way that XX sells projects to customers. This customer said No, we do not want to develop using your LCMS, we want you to use Lectora. Well, the only person in the office who even knew how to develop using Lectora was S, our developer. So a lot of nicety in our LCMA weren't in Lectora. For our projects in the XX's LCMS, we have…there were ten different screen designs were preprogrammed, exactly where the text and graphics would go, there were different templates you can choose. None of that were available to us in Lectora. We also had standard toolbar at the bottom to provide all your navigation, forward, backward, refresh, glossary, we always had a pop up box with narration text. None of that were available to us. So another caviar of this project was …thanks heaven, S was as wonderful as she was, she had to work with programmers and graphic designers to program Lectora to meet the customer requirements. So in addition to storyboard original content, we had to present the client with our vision of what the Lectora functionality would be. So it was like a prototype presented to the client. The way our storyboards were organized is that the very top was a lot of metadata that went with every screen, screen name we went to know where the content from, so just the metadata was at the top, then you had the actual screen would look like… there was usually a mockup of graphics, the actual text would be there and then below and the bottom third of the storyboard was the narration text, so the client would … you know, sign off all the audio, but we never but all audio was generally not recorded until the course development was complete. It was just, you know, and the reason for that was in this particular project we always wanted the client sign off on the text and visuals before we recorded the audio because it was really expensive if they changed any of the text and that we would have to bring our talent back and re-record the things. So we know audio was never done until the client said "I had signed off on the actual course, if you will". I mean we would put it in the LMS so the client would see the course without the audio so they can do their final review. S then made adjustments and then the audio was recorded. In this course you know we asked the client about the evaluation and they said because this is more informational, no, we didn't have… we didn't do your objectives, multiple-choice, true-false, quiz anything. We did put some activities in the course. At the end of every module, there was application of that activities, Flash based, where the learners could try the process that had just been explained to them and that they would receive feedback if they didn't do the process correctly,

they were redirected to read one more time and try. But no, on this particular project, there was no official assessment which was very unusual. Every other project I worked on, there was official learner assessment that it was actually recorded in the learner's history in the LMS. As far as implementation, a lot of for XX, a lot of times, we would host the courses for the client. For this particular client, once the course had gone through our test lab, had been tested in the LMS, make sure was working properly, then it was delivered to the client, and they wanted to hose it themselves. So once we were told that it was running properly in their LMS, we had able to sign off this project and we would not be responsible. I will say that, because of the contract we had with this client, part of the XX's responsibility was actually enrolling learners in the course afterwards, but that was a different team with XX, my team was done after we were assured the course was running properly in the LMS. .

Q11dii Describe the project in as much low level (steps, tasks) as possible

A11dii After we were given the assignment, the first thing I did was S and I met with our internal client, went with our analysis and design. After we had an idea for what the course, what the design was to look like, what the graphic demands were going to be as far as Flash, and also doing some programming within Lectora. Once S and I had an idea of that, then we immediately involved our media experts. I, as a project lead, contacted the media manager and to kick off the media part of the project, then that manager assigned the graphic artists/programmer who would work with us. And we had a meeting, we talked about timeline, we talked about requirements with the deliverables, when we need the deliverables from the graphic team. So that was put into place. And also, once when we knew actually timeline, I met with the audio visual manager to let him know the approximate date that I would want to record this and when I was going to need the audio file processed. And also, we always …I had a meeting with the manager of the test lab, to let him know when the course would be coming for testing and he's going to test it fast. There would be no…I just let him know that you have to turn this around in 72 hours because the test lab, it was rigorous you know, we would submit test, they would load into LMS. They would click through, give the discrepancy report, come back to us, we would do the fixes, send back to them and then inevitably even if we have corrected all the discrepancies they initially gave us, they always found things they want to tweak. So I met with manager of the test lab, letting him know you have got 72 hours to get it done, just so they know. So that was sort of the positioning the team letting the instructional designers knew the project plan, and once out, then we met the graphic designer, she herself sat down with her media developer, and they worked out how they were going to work together, and I kind of stepped back, because they were an experienced team, I would be in their way, so it was…so S and R were designing, developing, programming doing what they need to do. And then … We did have… because this project was in such a rigorous timeline, we probably met at least with S and R, the media developer, probably twice a week just to check in and see how the project was moving. And a lot of time

of those were informal meetings, I might just pop in, call just to make sure we were doing okay.

Q11diii What event/communication marked the beginning of the project?

A11diii First with our internal account manager T. I believe I may have met with T, no I… included S, I wanted S to hear everything from absolutely beginning. So I did bring her to the first meeting.

Q11div What event/communication indicated the completion of the project?

A11div Well, we knew the course was completed, after it has passed the test lab's review. Once we knew it was technically sound, that all errors, the development errors, the misspelling, graphics that weren't working. Once we knew we had a really sound course, then the client…then we hosted and put it up in LMS. I was able to get the client access to the LMS. So the client clicked through the course. Then I don't think after the client clicked through it they required any revisions. So once they have signed off and accepted the course, then we…I didn't actually have to do it, there were something done by our test lab people. They were the one that did the technical handover. I don't know how they did the final transaction of the course from XX's test LMS to the client LMS. I don't know if there were some, if they used some protocols or just FTP the course to the client. I was making sure the project was completed, absolutely. I was on the phone to make sure, you know, "Have you posted the course, does the client have the course". Then I talked with T, "Does the client have the course up running on their LMS, is it working". So I was the one following up on it until I was told that the course was functioning on the client LMS. That's when the job was over.

Q11dv What was your role in the project?

A11dv What I had was my managing gave me the project, a budget, yes I received a budget and the way the budget works in XX, sometimes you know the financial amount but the more important thing was how many hours can be spent on any part of the project. What I always did was my in-flight sheet. It was, I can show you, sometimes I would do a Microsoft Project plan, but this was so fast it wasn't worth doing in Microsoft Project, we just had every step of instructional design process including the media and development including the graphic development and I just had dates who was involved and how many hours each person had it to their work. I just mapped out in the Excel spreadsheet, gave it to every team member and basically said, let me know if you think if you run into something you think your hours is going to go over so that I can explain this. Because again I was working with great people, I don't have to worry that they were going to fail because of lack of knowledge or skills or just goofing off. If they told me the hours, they need more hours, I knew it would be legitimate reason. So basically my first role was to budgetary let everybody know that hours, to map out the timeline, and to check in. And I also... was the interface between the whole instructional design team and the client. My first point of the contact was the client, the in-house account manage. And I was checking in regularly with T, to let her know the project, I would let her know when S the instructional designer needed an additional client meeting or clarification. Because sometimes this

client was not…there was a little bit of confusion, it was pretty typical in the client world I would say… There were some disagreements, the client within themselves back in Boston sometimes would be fighting you know about the course content should be. So, I first would talk to T the account manager. T would either talk with the client obtaining the information we needed. And when necessary, S and I would have WebEx conferences with the client to discuss issues so we can keep the project moving along. So I was kind of facilitating that role. And then I guess, besides making keeping making sure that S and R were moving along nicely, I also dealt…when it was the time with the audio folks, I scheduled…I preferred all of my instructional design projects to schedule the audio talent myself because I want to know when exactly he was coming and exactly how much he took. I don't want to trust my budge to my other people. So I scheduled the audio talent and then made arrangement with the audio manager when his team is coming, I try to keep very tight hold of the budget, because in XX it is very difficult for leads who were not…it's tough if you don't hold to your budget. So I took care of that. Then again probably a week before we need the test lab, their service went very quickly, I checked in with the manager to make sure their people was available. So basically just to keep in touch with everyone. You know the management stuff. What I loved on their project was design, because I was the lead and the designer. I was the one who led the analysis meetings, I was the one you know who put the design together, with a lot of S's input, because S is quite frankly much better than I am technically, she knew a lot of things about Lectora that we needed to take into account. And yes I did get to lead instructional…doing the analysis and design, and I was quite happy to turn it over to development to someone else. Yes, S did the storyboard and I provided the content outline. We did quite intensive design document, basically we had every scene outlined. For each screen what we had was what the content would be, we jotted down what the visuals would be, what the graphics would be, and we also jotted down any interactivity we would want. So that was the details of the design the client signed off on, just screen by screen – you know, content, graphic and interactivity. And then once we had it signed off, I gave it to S, the magic happened. So the design was pretty much in great details, in that way the client couldn't come back and say, we don't like this. We would say, "Well, this is what you agreed to." This is part of the client management. I don't think this client actually wanted revision, what they had wanted was to deviate very much from the design document. Then you get into the cost conversation. Once the design has been signed off by the client, then I would just more coordinate, making sure the dance was smooth between the team members. Actually this is a very delightful team to work with, really good people. Other projects I had, we had multiple courses with multiple developers, but this one was really a nice project. That's why I want to describe to you.

Q11dvi What software and services were used?

A11dvi Lectora was the course content software, Flash. The audio guys… There was specific software they used when they were processing the audio files. I am

sorry, it's not Audacity, something that is used in professional studios and I don't know the name of it. Those probably were the big things, like Lectora, whatever the software was used for audio. We didn't shoot any videos with this. We elected not to use video. Normally with this type of training we would use Camtasia or Captivate. But we decided not to because the timeline was too tight. And then with the basic analysis and design we just used Words and the PowerPoint, yeah we storyboarded in PowerPoint. We used outside professional servers for the audios. Oh one of the little small software we used was SnagIt.

Q11dvii What hardware and devices were used?

A11dvii Just our laptops. Again the audio we had an entire audio studio in that building. So the instructional designer was using her laptop, the media programmer, media person, was just used his laptop you know, it was appropriate for Flash development. The audio folks had the entire sound studio with everything they needed. And our test lab had a LMS to host our course on. I think our LMS was more mainframe because it hosts a whole lot of the courses for other clients.

Q11e What were the outstanding features of this project?

A11e I think we did… we meaning primarily T, S and I did a really… I think with any instructional design project, a good, solid analysis and design is the heart of it. If you can really nail your analysis and design and understand the content, the interactivity needed, normally we would be a lot stronger in the evaluation, but the client didn't want it. But if you can get a really good analysis and design, the project would flow well. So I think this was one thing we did really well. Again on this project we were fortunate enough to have, I would say, the cream of the crops as far as developers - we had a super instructional designer, a super media person, and great audio. And that was of course not the case with any course development, not as in any company. This is super I think is because of the importance of this project. This was kind of our showcase piece for the client, also to gain more business. So they put really proficient people on the project, they made a lot of fun, everybody had the right skills, both as far as solid instructional design skills, knowing the theories as well as appropriate practices. Our media person had a really good feel for how to develop within Flash to properly present the screens. I think another thing that made it a really good project was because of the cooperation and the continuing conversation with the clients, even though the clients had some disputes among themselves, our interactions were pretty clean. The client was pretty cooperative, giving us what we needed. And we turned things around to them in a timely manner. Basically we were on time on budget. It was a pretty nice course, it was pretty, good professional looking. And fun too. The interactive exercises we had to reinforce things, I can't remember the specific names, but they were not the usual drag and drop, multiple choices, filling the blanks. They were more using the software interacting with the screens, clicking on things and things would happen to simulate. I guess that was the nice thing, some of the activities were simulating how the system would work. I want to say S's background has a

bachelor from UU I believe it is called Training and Development. She was graduated from UU, I don't believe she had started her Master's degree at that time. Her knowledge on instructional design really helped when working with me.

Q11f Did it occur to you that you wish to have done the project differently?

A11f Yeah, in fact, I was just thinking. S, the developer, was frustrated during the project because from S's perspective, it wasn't a good instructional design. But I…but that's always, I think given the constraints the client put on us, as far as their expectations of how they wanted the final product to look to operate, the content they wanted, given the constraints out on us by the client, it was the best instructional design we could have provided. However, could I have done exactly what I wanted in analysis and design? I would have done it differently. I think from cognitive perspective, I didn't always… just for information processing, there could be better ways to organize the information and present it. But that is not what the client wanted, we couldn't pass that. And I think that in my experience, my 15-20 years' experience doing this, that's I always have to make peace with. You know, as a professional, our role as an instructional designer is to recommend based on everything that we've…everything theory we've known, we can recommend to the client what would work. But at the end of day, they are paying, and we do, you do it in their way. I guess I don't feel badly about it. It's like going to a doctor, the doctor can tell you to eat less sugar, but then the patient fails the instructions. Same thing with our client, we can give them our best advice as possible, and they have to make their choice. And, so I guess as far as the project, I think it was a really good project, it was decent acceptable instructional design, the thrilled, but in my heart of hearts, from theoretical and that's the practice, I know things could have been even better. But, what can you do?

Q11g What were the solution(s) to the challenge(s)?

A11g Basically let them solve the problem. We identified who was the customer final sign off was, who was going to write us the check. You know basically I guess to put it crudely, the person who is paying, as far as I'm concerned, gets the final say. I mean they are buying in a product and whoever is going to pay for it, in my estimation is the one who has the final…is the final decision-making authority. So we identified who the lead client was and then she…we would basically let her discuss with her team when they would be disagreeing with each other on the phone and we would just ask when a final decision was made and if this lead client could let us know what was the final decision and we would proceed. And yes, they gave us response on time, because they wanted this training on time. And we made it clear to them, if you don't … and we share the project timeline, you know, there was a list of their tasks and due dates, and there is a list of our tasks and due dates. And if you miss, you miss, your project is going to be delayed by the number of hours or days that you delayed because there's no slip, that is no opportunity for slipping in this project. With other client, that would happen that they do not always follow your guideline or timeline, there was enough room provided, padding to accommodate that in the project plan. But for this project, T was really good,

the account manager, she just told the client right up front basically your expectation was unreasonable, we don't' develop a 45 minutes course this fast, so she said "We would do it for you, provided you meet every deadline too." So you know there's no other way to do it. Yeah ,we were feeling a lot of pressure, I mean S and R, they worked evenings and weekends, but then I told S if she could do this, I would just give her comp time to make up for her effort. I talked to R's manager and asked if he could also reward Richards a couple of days off to make up for this, that helps. Because with such great team members like S and R, you don't want them to feel being taken advantage of and look elsewhere for employment. Really you hate to lose people like them. People like to be treated like human beings. So I always try to protected team members in that way to make sure they were treated respectfully and then we never forget that that people are human beings, lives. And another nice thing we were able to do with this project was XX offers an award for teams that do well. We were able to nominate every member on the team for this financial reward. And the office manager did approve them because we met our commitments and the client was so happy. So people receive extra money in their paycheck which was nice. S worked exclusively on this project for five and six weeks, I had other work that I had to work on, I had other projects going on same time. But S was exclusively on it, our media developer was not. He was juggling for other clients. But he knew that this was the priority, he just had to work with his manager. Then the audio team I knew was not exclusive for this you know we probably only need them for an hour in order to record them processing. The test lab was never exclusive, they always have a long list of courses to test for different clients. It was my job to make sure this project had the priority. A couple of times, the media developer R came to me and he said, "I have something else I have to do". So I would talk with his manager and then he was able to joggle assignments in the media team. So it was my role to be a negotiator, the internal negotiator. I just make sure the ballet proceeds.

Q12a What specific knowledge, concepts, and ideas that helped you?

A12a We used the ADDIE model. We tried from cognitive perspective, to really think through how people would do their work using the software and we try to explain, teach, display the functionality of the software in logical progression, so the learner would build the mental models that they would able to take back and actually use on the job. I mean I was very conscious to try doing the analysis and the design to design so that the learners would develop their mental models that would be valid back into in the job. Another thing, um, I believe is the information processing. I'm a big fan of Gagne's, quite honestly so it was the idea of presenting information, letting the learners to interact, to act with it, just trying again try to get the knowledge from the working memory into the long-term memory by practicing, repeating. This kind of coming through Gagne's nine steps, if you will, you know, give the gaining attention, give the objectives, show them how to do it, let them do it. We really don't have a lot of time to really reinforce too much, they would have practice exercise, but that is as far as analysis and design, it was kind of

going through my mind to help people to build those mental models you know getting the information from working memory to long-term memory. Other things that made the project successful was, I think, just a lot of practical experiences. A had 10 years at YYY, but at this point, this project was done probably four years into my tenure with XX, so I really knew the company processes. I knew all the team players as far as the managers three other managers I had to work with the test lab the media, their corks, corks might be a bad word, I knew how to work with them to get what I wanted, if you will. I knew how to pleasantly work with them. So we could mutually accomplish what we needed to. It was very helpful to know the other managers working style to know their preferences, how they want to be communicated with. I also knew both the instructional designers and our assigned, the media developer, and the audio guys, I have done many many courses with them. So we kind of.. It was so well orchestrated we just knew how to work with each other. So from practical experiences, it was very helpful too. And other things that make this successful was that again S was the only in-house person how knows well about Lectora. She had had a lot of heartache using Lectora with another client, so she had learned, she knew exactly what she needed what is actually needed to be done and she technically ran this show. So that was very helpful.

Q12b What soft skills did you use?

A12b Understanding your team members, knowing their styles. And also I am a big believer in staying in touch. I like to document everything and e-mails. So I would send a lot of e-mails both in initial e-mails introducing the projects, then we would have face-to-face meetings. But then I'm just a big believer of checking in with people and not let things go too long, so e-mails or just dropping by people's cubicles, instant messages that is acceptable in XX, picking up the phone. Yes, communication, talk, talk and talk. We didn't have to do a lot of conflict management. I had to do that on other projects. This project, fortunately, there was no conflict management I needed to deal with. I would tell you quite honestly I had to do conflict management on other projects, sometimes between me on the other managers, just because… not that we were ugly to each other, but everybody was under so much pressure that there was a real skill that I had developed. Maybe that is why this project worked out so well is that I and the audio test lab, the media manager had been through so many projects together, that we've learned how to work with each other. I think a soft skill that is really important is just to respect, just based on human respect, but also respect for the pressures that other teams are under, and having just to talk and negotiate and compromise to figure out how we would get this project done, knowing the constraints everybody was under. The conflict I had before was always about staffing about resources. No, we never had disputes or discussions about how tactically a graphic were going to be done, how the audio was going to be recorded, it was always about staffing. You know, I would come in and would say, whether they it was an instructional design project or translation project, "Well I need this, this is my deadline". And we would say "No, we

cannot do it. We're too busy". And then he would be, "This is what I need". And then we just have to figure out how to do it, and especially with audio people, what we ended up doing was, we had it to work out a compromise - we would work odd hours. Sometimes we started recording at seven in the morning, other times we would record in the evenings and on weekends and just flex people's schedule, like if S had to sit in a recording on a Saturday, then give her Monday off, so just kind of human respect and also try to be creative, to figure out how to accomplish the work and then just band the rules, do what we need to do. Yes, coming with a creative solution.

Q12c What hard skills did you use?

A12c Writing. I think from analysis and design, being able to ask the correct questions, to be able to ask those what do we need to be able to know, and do at the end of it, and to start drilling down once the person, for this particular course, they need to know how to use the software to register learners. Okay, then, just drilling down into what's going to be asked, what screens to be used, technically just ISD skills, I guess, just that drill down analysis, uh design probably skill there would be visual skills, especially with eLearning just visually how we were going to present this. So that learners would really understand. You know which screens we would show and how we would automate the screens so that learners could interact with them. So you would need good visual skills and would say some good… for the instructional designers, we need understanding of what Flash could do and how we would like the Flash to operate and with our media developer obviously he was…we would consult with him, "Can you do this for us which in the time we have?" So we have to know what the software can do and can not do. And if we don't, we have to ask questions, "Is this design going to be workable?" We talked about analysis, we talked about visual design, we talked about the interactivity, understanding software. What else? The hard skills…I think about the WBT, we need to understand any constraints the LMS will have. Not for this course, but we did have a course that was designed and developed in the country but the LMS was not hosted in the United States. That was a real issue to understand the LMS, yeah, because we had a client to roll out a Web both in Germany and China, their LMS systems were not compatible with the way our courses were developed. So we need to ask LMS question right up front and involved IT if we need to. So that would be another hard skill. And then I guess this course did not have a lot evaluation in it, but in general a hard skill, I think assessment writing is a skill itself, to be able to write a good objectives assessment, and understand how the assessment is fed into LMS. Probably an important or a skill or something you need to do, is to talk with the client what kind of information they want LMS collecting on each learner. And make sure the courses were so designed that it would pass that information to LMS, you know how many times they are going to allow the learner to attempt the modules, do they get to retake their quizzes, that kind of things. We would recommend, but a lot times we asked questions so they would make the decisions.

Q12d What attitude did you realize that was helpful for the success of this project?

A12d I think during the time that this project was being developed, the economy was very very difficult in Detroit, I think the attitude during the project was just one of the realism... even though it was with a compressed timeframe the attitude had to be that this is a good client, we hope to obtain more business from them, so it is very important that we provide them a good value added product, and even though it was a tough deadline, we are going to do, we are going to do it well, because we all like our job. It is just as critical to bring as much business from this client as could. So I think the attitude is very realistic. We will do what we needed to do to serve the client and hope the client will provide additional business. Again I think on any team, respect is very important. In all I think respect is just a basic human courtesy, but also I think you need to have respect for everyone's talent, I guess what each discipline is bringing to the party if you will. I think there needs to be…I think nobody in any eLearning party knows all can do it all, I think the instructional designer needs to respect as the media developer is telling him/her as far as their recommendation of what or what can not be done in the amount of time allowed, a lot of time the media developer has to respect the designer that there were good reasons why that we requested we were requesting; for the audio people, we need to respect that they have certain requirements as far as the way they run their sessions their expectations because that's what they needed in order to provide real professional sounding voice over. So a human respect, a respect for individual talents, what's people contributing to the project, uh…when possible I think nice to have fun, able to laugh. And also I think ultimately I always think there would be a little bit of joy when you produce something that's really good, so you know, allow that sense of joy to be there, not to be sophisticated excited about what you were doing, because I just think that instructional design is just wonderful, and I think it's nice to keep that sense of joy alive. It is fun, I don't think as an adult we were so sophisticated, we jaded, that we lose that sense of playing.

Q13 Which year was the project? What do you wish to have known that you didn't know back then?

A13 Summer of 2010 I believe. Well, I tell you, technically, I just said before that we should have a good understanding of LMS, I wish I had known more about the client's LMS, I think that had I done some upfront research and asked a few question upfront about the requirements about their LMS, that might help shape the eLearning design a little bit better. The one thing it's usually impossible with software training is that…I wish I could really see the finished software myself, that would be just huge to be working with the final product rather than with the software prototype that we had to guess so much. We had screenshots of prototype screens that the graphic artists was working off of, to develop the interactivities, and then we obtained the final screenshots , then he had to swap in the final screenshots and just all of his Flash perimeters so you know the buttons were clicked in the places they were supposed to. It did take some time but we had to accommodate what was given. Another thing, this was not possible in the project, I would love to have a face to face meeting with the client. The client was based in Boston, we

never had a face to face meeting, everything was over phone, or telephone conferences WebEx, using our in-house account manager as the interface. And if it is possible, it is always nice to have a human touch on the project., yeah to sit down and look at the people, we were not able to do that. I want to say our account manager periodically went to Boston, she was based in Detroit too. We did it all over the phone, very virtual.

Q14 What are the other knowledge, skills or attitude which were not used in the above project but you used in other Web Based Instruction projects you led?

A14 Evaluation, the assessment, that was I think the big thing missing from the project. It bothered me that we didn't have enough time, budget or client interest to do more as far as reinforcing exercises or actual assessment to make sure people were learning what they were supposed to learn, I think that was the big deficiency of this project, the deficiency of this design, but it wasn't our fault. I would also like to have known a little more about implementation, at what stage it would be. Well we knew a little bit about this, but it kinds of bothered me that we didn't know how this courses were received. The courses were…this body of work was 45 minute, written for the automotive clients for the service technicians, and when we were translating, the original body of work was written generically enough it was courses about how to repair brakes, or basic electric theory …basic enough that would apply to any automobile, so what we tried to do for all the graphics was that we did make a very…with the graphics, we tried to keep the graphics as generic as possible. Like if there was a picture of an automobile battery, the graphic artist would take Photoshop and wipe out the manufacturer label, to try to make it the graphic, so they would be applicable to any country not be offensive because we don't use that brand. In later courses where we were getting into more specific rollouts of vehicles, I know we did a project for Brazil, we were doing training on a specific automobile that was being introduced into Brazil, but it was basically the same automobile but with a different name and a little bit different look in the United States, so for that we had to make an accommodation to substitute graphics that were appropriate for Brazilian market. So yes, some of that did go on in later more customized courses or boutique courses. So I guess that's a skill that I didn't have to use in these courses but used just in almost every other ones, the international implications, whereas this courses was just for U.S. audience. What we did find in translation was we could use a fairly sophisticated English, the important thing was not the vocabulary, it was sentence structure. And so that I could use advanced vocabulary but the sentence structure is as much as possible should be noun, verb, object, that way a translator… because you know even though you are very proficient in English, you are always going to be better in your first language, so if you were translating automotive content into another language, the more clearly English is written, it is going to be much easier for you to translate into another language. So that was something. There was a great resistance in our office, the instructional designers just furious to write what they considered to be very blunt English. I would say to them, "Do you want to write flowery language or do you want

it to be understood in six languages?" So yes, that I think is the skill to be more and more… If you are going to be a corporate instructional designer, it's very important to be able to think through the graphics you use and your language and also your interactivity in the way the final published course operates to make sure that internationally your graphics, your language, your interactivity and the communication with the LMS will work globally. You know what, in those original courses, I saw it several other times during my tenure in that company is that after we have been translating for a year or so, whenever a new course would kick off, we would say, "Write for translation." And they wouldn't do it, neither the XX's people themselves, or the client would say, "Oh, we are not going to translate this". And the lower behold eight or nine months down the road, all of a sudden, "Oh, China wants this", "Oh, Mexico wants this." It cost a lot of more money because the English was not written so that it could be easily translated, it raises the translation costs, because often you get back a translation that doesn't make sense. So we had our internal languist, she would look at the translation and say, "This is not making any sense". So I would either pay the labor cost for her to revise things, or we would be sending back to the translation company and making them fix it. We would not pay them more money but it would cost more time. And when we bring it back, S would look at it again, and the same thing was happening was French, Spanish, German and Russian to. So it was much better to do it right first time.

Q15 Assuming you are hiring a person as a beginning instructional designer in Web Based Instruction, what skills are you expecting?

A15 I'm going to want to say that I want some basic instructional design theory, I want that person to understand the human cognitive structure. I want them to understand the information processing model of introducing information, knowing that it's going to sit in the working memory and understanding how to apply appropriate instructional strategies so that we can help the person incorporate that knowledge into their long-term memory. So I'm going to want some basic theory, maybe not sophisticated but to know that you introduce , you explain, you're going to reinforce the instructional strategies so that the person is going to end up owning that material. So some basic theory for web-based training, I think they are going to also have to be visual literate, this is something I am sensitive to because I am not a visual person, but I do know that for web based training visual literacy is very, very important, to know how to present information, so that people can easily understand it. I think with the web based training, you get to know how to stage your visual presentation, again don't cognitively overwhelm people Probably when somebody is looking at a screen, working memory is like 5 +2 or -2, visually you want to be very cautious not to overwhelm people. I think a beginning person is going to have to have good technical fluency. It seems that the employers now they want somebody who comes in, if they don't know Captivate or Camtasia, they're going to have to have the technical aptitude to pick it up very quickly. I don't want to say everybody has to know Flash, but Captivate or Camtasia or Audacity, they have to be comfortable with some

basic tools. Again, there are so many learning content management systems LCMS, you cannot require you must know Aspen, but again I guess the technical fluency, the lack of intimidation, to just jump in and be willing to load your content. So I would say basic instructional design theory, I would say basic technical ability. And one thing I saw over and over appalled me was that people coming out of undergrad program, these were native born Americans, they could not write grammatically correct English. In fact, I would say it is a real skill, people need to know how to write grammatically correct effective English, or their native language. If the course was being developed in Germany, write good Germany. I used to do a workshop of how to write global English. I used to tell those U.S. born people, "Write English as your first language". You know just because it's so irritating, I can't… it is appalling to me. So I would say they need good instructional skills, basic technical skills, and they need to be able to write to express themselves well in their native language.

Q16 Assuming you are hiring a person as an experienced instructional designer in Web Based Instruction, what skills are you expecting?

A16 For experts, besides the things I mentioned: theories, instructional strategies, technology, I would just say probably if you are an expert, you have to load on some project management skills, benchmarking skills. I would expect timeline management skill and budgeting skill. As far as soft skills, they need to know how to appreciate and respect team members, able to advise and mentor people. Also, I would expect them to stay current on changing and emerging eLearning technologies through reading, attending conferences (if budget allows), downloading trial versions and experimenting, or any other means the person might use.

Q17 Which direction do you see Web Based Instruction is heading to?

A17 I see it to be more technology involved, business oriented. The training would be more just in time training as well as the traditional type of training. I believe we will continue to have "books on line" interactive type eLearning, but the information will be presented in just-in-time smaller segments. I also think that with the evolution of smart phones, mobile knowledge management databases will become more prevalent. I also think that we will see more virtual K-12 schools as more parents opt for home-schooling or become disaffected with our public school systems.

Q18 What do you think an instructional designer should do in order to keep up with this direction?

A18 As an ISD, you are never done with learning. Don't isolate yourself, attend professional meetings, keep reading to keep up with broad knowledge. Teach yourself emerging technologies, to go conferences, participate in LinkedIn forums on eLearning. Keep thinking about the proper place for social learning, such as LinkedIn, blogs, Twitter, Nings, wikis. …

Q19 Anything else that was not covered in our conversation but you think is important?

A19 I can't think of anything at this time. This was a very thorough and thought-provoking interview!

Transcription of Interview 007

Q1	Good Evening, thanks for taking time with me. Can you tell me your current job title?
A1	I don't have any, I work for a company where we do not do those
Q2	How long have you been working in the current position?
A2	11 months
Q3	What's your age range: 25-35, 36-45, 46-55, and 56 above?
A3	36-45
Q4	Would you say you <u>are</u> actively involved in instructional design?
A4	Yes
Q5	Are there any other positions have you held before, that were related with instructional design?
A5	Yes, several, it was four different types of positions related with instructional design, I was a training manager for 7 years and instructional designer for three years, and some other companies.
Q6	How many years accumulatively do you estimate you have worked in design/development for WBI?
A6	I would say about 12 years
Q7	In those WBI projects, how many years accumulatively do you estimate have served as a lead instruction designer/developer?
A7	I would say about four years.
Q8a	What's the major of your bachelor's degree
A8a	Near Eastern Studies
Q8b	Did you have postgraduate education: Master's, or Ph.D.?(What's the major?)
A8b	I have a Master's degree on Ancient Near Eastern Studies, and a doctoral in Instructional Technology
Q8c	Have you had any other training on instructional design?
A8c	I've gone through a lot of conferences, and courses were offered by vendors
Q9	What's the business nature of your current organization: business/industry, education, government/military, health care, independent, other?
A9	Business
Q10	What's the estimated size of the organization you are working for?
A10	200 employees
Q11	Can you tell me a Web Based Instruction project you are very proud of or got highly recognized?
A11	We created a kind of web-based training application to teach HR representatives how to implement a new HR program.
Q11a	How many team members in the project?
A11a	There was really a core team of two. Yes, another instructional designer. We both had fairly good development skills, so we did the design and the development.
Q11b	How long did it last?
A11b	Three weeks.
Q11c	What was the project about, was it about how to complete a step, process, use systems, or how to perform physical jobs, or change attitude/value?

A11c Yes, we're teaching people. It's primarily concepts and procedure.

Q11di Describe the project in a very high level (the process by stages)

A11di I think there was a short phase where we found the scope of the project, identified client satisfaction criteria, determined exactly what we were looking for, and then a very quick design and development phase with about two weeks, and then implementation. It was internal.

Q11dii Describe the project in as much low level (steps, tasks) as possible

A11dii This was a long time ago. We had, we were first contacted by another group in the organization. They were preparing to outsource the training to an external vendor and I think the quote that they had gotten from the outside vendor was in the range of $70,000 and they had heard that we had developed a method for quickly developing web based courses and wanted to see if we could help them out, and I think it really helped out with several thousand dollar charge. We had several meetings initially where we established the nature of what they wanted to teach, identified the learning and performance outcomes. And then once that was done, we met with subject matter experts several times to get the contents together and then the development of the resources that we needed, and then several meetings meeting with the customer to allow them to review the content and make changes and things like that. There was, I think, a reaction questionnaire that was associated with what we did. We didn't do any sort of measurement of learning or performance. Yeah, it was web based intranet. It probably was close to an hour. It was fast. And that part of the reason why this is one of the courses that I think really highlighted – is one of the best ones that I've engaged in, because the incentive, uh that's not the right word, the sponsoring organization was very motivated to get them quickly. We were given all the resources that we needed, and we had the right people to get it done. Well, actually we had tested the development model on other courses and had produced several courses and had been kind of documented methodology, and so people, the group that needed the course heard about it, so they came to us. I think we probably weren't the first choice, but they were really under the gun, so that's what got them to us. As far as resources go, we actually didn't need all that much, because we had the ability and necessary competencies with the two instructional designers to do all the development as well as the design. One of the reasons why it was so successful was we didn't ask them for so much. During those three weeks, we were really engaged in this one.

Q11diii What event/communication marked the beginning of the project?

A11diii You know, there may have been but I wasn't involved in it. I'm going to guess it was a kick-off meeting with people higher from the organization. Then we just got a call. They said, "Can you do work on this project?"

Q11div What event/communication indicated the completion of the project?

A11div The project really ended when the course was—for us anyway—when the course was loaded into the learning management system and people began registered on it. We were fortunate in that it went live, there weren't any problems that required us to go back and rework the content but it actually hit the ground and worked very well. I don't remember precisely, I think what we

did is we took all the files that we've created, zipped them up, and then sent them to the team they uploaded it to the learning management system.

Q11dv What was your role in the project?

A11dv Design and development, project management as well, working with the subject matter experts, did a little bit of graphic content development. My role is primarily working with instructional designers to—I'm sorry, working with subject matter experts to identify the [content] and get it represented in the course. We had created a tool that allowed us to use the design document as part of the course. I know that sounds odd, but we created a tool that allowed us to… that converted Microsoft Word content and put it into HTML, and it was designed… yeah, and it was designed in such a way that the content, uh we didn't want in the course, we just would assign it a certain style and when the course played, we just ignored that content. There was one Word document that had the content. There was another Word document that contained the course outline. And the tool again took the outline document and converted it into the course navigation. And so, those were the two documents that we worked with. It's correct to say we automated the process. We just – or another note on that, our attitude was we were at a meeting where instructional designers would say things like, "Well, I went and worked with the subject matter experts and then I went back and it was all these work." We decided that we would create a project where we got rid of that, went back and… part of instructional design that we tried to make our instructional design so that it happened in front of the customer, so as the customer says, "Well, I need the course to do this, this, and this." Between the outline document and the content document, we actually built the course. So as we're building the content and working on the outline, we could push it then, and then the subject matter experts could see how the course was starting to shape up right there. Yeah, so we had several interactive pieces and those were built while we were not in front of the SME. In this particular course… well, let me put that again, we had taken the same approach that we used for overall course development and had applied that to the interactive pieces as well. So, for example, we had several things – we actually called it interactions and these were Flash products that pulled data from Word documents, and so you could at run time… and so the Flash file grabbed the content from Microsoft Word and explained. So it actually allowed us to create some fairly sophisticated interactions entirely in Microsoft Word, if that makes sense. We identified the base parts in Flash file that required content that might be specific to particular course and we made it so that the Flash file would pull that information from the Word document and that allowed us to reuse the interactive confluence across courses. We had to… we had to write the Flash file in such a way that it would load in an XML file in run time, and so that coding happened before we were working on this course. We already had those interactions developed. I did the Flash development. We had both audio and video in this one. Well, the two of us did the audio and video work as well. We created JPEGs and MOVs and AVIs and stuff like that. The audio wasn't music; it was – I think we had several parts where I think there was an

		introduction from one of the HR leaders. It was on an audio, and then we had a couple of other instances where there was an audio narration that the company pre-texted.
	Q11dvi	What software and services were used?
	A11dvi	Well, again, we had developed a tool that allowed us to do most in Word. So we used Microsoft Word. We used, of course, PhotoShop for the images. We used I think Adobe Audition for editing audio file. We used, of course, Internet Explorer for displaying the content. Uh, I am try… I do not remember. What was the name? Adobe… Premier… I think we used Premier. We didn't use any outside services.
	Q11dvii	What hardware and devices were used?
	A11dvii	No, I think we just used a microphone, it might have been a little bit fancier than the one on the computer, but it wasn't a big deal. We used the digital cameras for taking pictures – nothing special beyond that. Yes, we used Flash, but all the Flash work was done prior to that course, so it's probably worth mentioning.
	Q11e	What were the outstanding features of this project?
	A11e	I think the speed with which we went from initial contact to development. I think the relationship we developed with subject matter experts because they're able to see their ideas presented in the course instantaneously. We saved the other department ton of money. I think those were the big things. I would say there were probably three SMEs. When we talked with SMEs, we talked with all of them. We had kind of a big meeting that kicked off and then we met with one several times where we really got into the deep recal of what it is that they needed and how they wanted it done. And then after we finished putting all the content together, we had another meeting where they all kind of looked at it together.
	Q11f	Did it occur to you that you wish to have done the project differently?
	A11f	Looking back on it, I'm sure that if we had more time, we could have improved the interface, just the look and the feel. I think we also could have better identified how the target audience would actually do the process and perform what they're being asked to do and then better demonstrated that, because I think we gave them the base case of, "Here's you can use this tool." But as I think back on it now, we probably could have showed them, "Here's the main way that you could use it, but let us also show you another example of having it this way, an example of how you could use it in this situation." But I think we should have provided a greater variety of applications to it. The SMEs did tell the target audience characteristics, and I know we asked the questions to get at that. So for example, there's an international audience, we knew the organizational role; we knew that they did not have experience using the tools that were being implemented – so I think they were forthright in answering all the questions that we had. I think what happened was is we came to a better understanding of what exactly it was that they were asking for… we were already far enough down the tasks but we couldn't have made all those changes.
	Q11g	What were the solution(s) to the challenge(s)?

A11g You know, that's a great question. We were… so what I said earlier on that we were given the resources that we needed – that's not exactly true. One way in which we're kind of limited was access to the target audience. I do recall that we did get access to one person. He was able to come and actually took an early draft of the course and actually went through it, but that was just one person. It would have been nice to have been to do that test with somebody in another country, and we weren't able to do that. And when I say interface, about wanting to improve the interface, it's really I think more about the look and the feel, just a little bit more professional than what we had. I think we needed a full-fledged graphic artist. We had somebody who was good at graphics but was not…didn't have the ability to do the interface that I think was needed. But not to say that it wasn't a good graphic, it was very good, but I think it could have been a little bit better.

Q12a What specific knowledge, concepts, and ideas that helped you?

A12a A couple of things: I think what differentiated us and made us successful was following a development process that was more of a rapid prototyping model, where we went to… had several very quick iteration, rather than doing all the design and all the development and testing and stuff like that. We would design, develop, and test really fast, and we did that maybe—I don't remember how many times—four or five times, you know, to… and so we would meet with subject matter experts they were here, and everything that they shared with us was implemented, and then iterated. And so, that was one thing. I think another thing that helped was, I think, understanding the learning theory is very helpful, and I think having the development skills was very significant, because we're just able to take an idea and implement it.

Q12b What soft skills did you use?

A12b I think building a strong relationship with the subject matter expert was important, as well as communication with the customer or the client. Because the subject matter experts did not have a lot of time, had we had not demonstrated competency in our profession and built a good relationship, we wouldn't have been able to get their time to do what we needed to do. Yeah, that was huge. That's as far as soft skills.

Q12c What hard skills did you use?

A12d You know, we had the ability just on our team to do all of required technology development, I mean, all graphics, all audio, all video, and that was significant. Anyway, I think that's all to that. So for example, if you were working with the subject matter experts and you were sitting there behind your laptop and projecting on the screen of what they are saying and they see you're moving in Microsoft Word like you own it, that's huge, because you could… I mean, they see little things happening like keyboard shortcuts and auto text entries happening, things like that, and you were representing what they're putting out almost as quickly as they can get it, uh, that's huge, because they see that as they gave you their time.

Q12d What attitude did you realize that was helpful for the success of this project?

A12d We're a little bit cocky, I think, because we knew that we could do well what it was that they were asking for. And I think there's also this desire to prove

ourselves and the method we were using. I don't know that I would say we're open-minded. I think another attitude we had was one of not telling them what the way we thought it should be, but really asking questions trying to understand and identify what it was that they want.

Q13 Which year was the project? What do you wish to have known that you didn't know back then?

A13 Maybe 2004. After the project that I just described, I was able to spend a lot of time with Michael Hammer. He wrote several books that ended up being in New York Times. One of them was "Reengineering the Corporation." Another one was called "The Agenda." I was able to pick up a process engineering – or process reengineering background – as well as a little bit Six Sigma understanding, and I think having a better understanding of how business processes worked would have helped us better identify—no, scratch that—would help us better guide the subject matter expert into really focusing in what it is that people needed to do and understanding the inputs and the outputs, and that would have helped us better frame the content for the users. I think how I would change or better change the course is that I would have focused on, "Okay, what are some triggers that would indicate that you need to start this process of teaching you?" And we really didn't teach that. And then we also could have talked about, okay, as you're doing this process, what you should be thinking of as the deliverables. We didn't teach them that either. And if we had done that, I think that would have given them a better sense of, "Okay, here is the tradition, here's what you do, here's the output." As it was, we really kind of focused on the process. Well, not necessarily beyond the process, because a well-defined process includes the suppliers input in the process and output in the customers, in fixing the language that is called Sidepot. If we had had a better understanding of how business processes work, we would have investigated more deeply the specific process that we were taking and better define that, and then we could have a better design. Better understanding in general of how business processes work would then help you ask the right questions to better understand the specific process that you're trying to teach.

Q14 What are the other knowledge, skills or attitude which were not used in the above project but you used in other Web Based Instruction projects you led?

A14 Well, so, closely related to – let me just give you another quick example. At a job subsequent to the one we've been discussing, I was in a team that developed an instructional product that was primarily procedural in nature. We're often teaching people how to operate software program or do a process that included software. Often people would come to us and say, "Hey, we need you to teach us how to do this," and then I designed an instructional tool and they floundered for a while. Eventually, I came to realize the reason why we were having trouble is because the business hadn't really identified what its process was, and so if you have an instructional designer who is teaching process who doesn't understand the business process, you're going to have a hard time working with the subject matter experts. Yeah, in fact, I think the instructional designer should have an introduction to business processes. It's

part of the core curriculum if they are planning in going into business. Yeah, I think now you're going to have an introduction to Six Sigma, you have an introduction to QA, you ought to have an introduction on how to design a business process. Just a quick story: I was talking to the chair of probably one of the top ten instructional design programs in the United States, and I said, "When was the last time that you sent out a survey to the employers that are hiring your graduates and ask them what skills, attitudes, and things like that, that you should be teaching them in your program?" "We never have and I never will", because he thought that he knew what they needed more than they needed. He was really an arrogant… that I was… he'd actually kind of set me back. That's why I remember the conversation.

Q15 Assuming you are hiring a person as a beginning instructional designer in Web Based Instruction, what skills are you expecting?

A15 I would love it if they had a good foundation of… and be able to quickly learn software applications, and if they had at least a basic understanding of how audio files work, video files work, HTML works, could do web development, and they have to be able to quickly pick up applications like Captivate and Camtasia. The idea was they would be able to quickly pick up applications that would allow them to build a course. If I had somebody who had excellent instructional design skill, but didn't have any of the technical stuff, I don't know how useful they'd be, because – it's actually interesting that I've had several people that have been on my teams who were instructional designer but didn't have development skills and they were almost useless, because what it meant then is that… let me slow down here, what it meant was that they consumed a developer's time, where if I had an instructional designer that could do the development, it's much more efficient than paying two people to work on the project. I got to have one person do it. Oh, yeah, and then the other thing is the fact that they had business acumen, again, understood business processes, and then… you know, a very practical get-it-done instructional methodology and I think like, what Ruth Clark teaches is great, some of David Merrill stuff is really good – yeah, somebody that can get it done.

Q16 Assuming you are hiring a person as an experienced instructional designer in Web Based Instruction, what skills are you expecting?

A16 Well, for somebody who's experienced, I would expect that they might have a better understanding of the learning management system and some of the standards like SCORM that they could talk intelligently about measurement. Boy, it would be great if they use Visio and could identify documenting process. It would be great if they came prepared with a design document template, an instructor led template and a job aid template. And they had a toolbox of things that they had accumulated over their years of work, so that when they hit the ground, they would just knock away the subject matter experts with how quickly their courses were put out. The management skill, it would be great if they can talk to the graphic artist, they understood graphic artist tools like Photoshop, things like that. It would be great if they could talk to developers and knew enough about codes, understand when the developers

were leading them down the wrong path. We had – I had a lady who worked for me come to me in tears because she was in a meeting where people were yelling and screaming at each other, and you got to have a thick skin. If you think about it, I mean, most often, very most, training is an afterthought, they're arguing well down the project plan and somebody says in a meeting, "Oh, hey, shouldn't we teach people how to do this?" That happens all the time. And so, training came to them when you're under the gun and if the tensions are high and the project ought to get out door soon, and if somebody starts yelling at you and you melt down, that's not good. I think it's more for the experienced person, but if you think about it in a graduate level program, if you're going to have a project that you're putting instructional, you know, people who are learning instructional design, you might want to simulate some of that stuff, you know, have the instructor come in and scream at you for a little bit. You know what? One of the best things I've come across is a great tool out there called 'management tool' and they have an excellent tools and resources for how to do that.

Q17 Which direction do you see Web Based Instruction is heading to?

A17 Probably more and more mobile devices. Well, I did my graduate work at a constructivist's stronghold, so I have to believe that – I worked in a company, it's very successful. It's growing quickly, and there is no internal training. There is no training budget that I've heard of. It's almost not I paid attention all. And they get by. So anyway, I don't know, I don't have anything important to say about that because I'm not sure. Well, I think there are a couple of other things: Like the Khan Academy – have you heard of that? It's Khan Academy. It's either K-H-A-N or K-A-H-N Academy. You ought to look at it. This guy has hundreds, if not thousands of short videos that teach all the concepts that ranges from basic addition up to math calculus, and I think he's now added stuff on chemistry and physics and engineering and social sciences. You can go out and learn about a ton of stuff there. I think what you're going to see happening is that learning becomes more of where you go out and find the information that you need.

Q18 What do you think an instructional designer should do in order to keep up with this direction?

A18 Well, I think in business, we need to demonstrate that our skills add to the bottom line – that as a business implementing a new product to service, that its success is closely related to how well people are prepared to perform. So I think there's a little bit of selling that we need to do, and I think we need to demonstrate competency in the tools that are required to do it. Anyway, you know what I… I'm just thinking aloud. I don't know if it's correct, often people going to teaching and training, because perhaps they don't have good technical skills, something like that. It's not that they love teaching and are passionate about teaching, but they're not… they couldn't make it in the engineering and they couldn't make it into – I don't know. So then, in teaching and they go show up and try to work with people who are really strong with technical skills and they just don't make it. Well, yeah. So, you know, the other thing that I found helpful has been I was able to do graduate

school at two locations. One was, had a very cognitive perspective and the other one had more of a constructive perspective. I am very grateful that I had both of those, because it allowed me to kind of compare, contrast both of them, and so I think there's so much out there about learning theory… I think having a strong foundation of learning theory is very important. So many times you would hear people saying, oh, I am a visual learner, auditory learner, I am a kinesthetic learner, or something like that. Well, they completely misunderstand what that's all about, and it seems like I hear more about learning that's actually incorrect or not accurate according to what learning theories have to say, that's probably the way to put it. Anyway, so I hope people coming out of a program would actually talk about behaviorism cognitivism, and constructivism.

Q19 Anything else that was not covered in our conversation but you think is important?

A19 No, I think I'm good.

Transcription of Interview 008

Q1	Good Evening, thanks for taking time with me. Can you tell me your current job title?
A1	Senior Instructional Designer
Q2	How long have you been working in the current position?
A2	4 years
Q3	What's your age range: 25-35, 36-45, 46-55, and 56 above?
A3	36-45
Q4	Would you say you are actively involved in instructional design?
A4	Yes
Q5	Are there any other positions have you held before, that were related with instructional design?
A5	Yes, since 1996.
Q6	How many years accumulatively do you estimate you have worked in design/development for WBI?
A6	Since 1996.
Q7	In those WBI projects, how many years accumulatively do you estimate have served as a lead instruction designer/developer?
A7	8 years.
Q8a	What's the major of your bachelor's degree
A8a	HRD/ Training and Development
Q8b	Did you have postgraduate education: Master's, or Ph.D.?
A8b	No
Q8c	Have you had any other training on instructional design?
A8c	Completed 16 credit hours of Masters at WSU.
Q9	What's the business nature of your current organization: business/industry, education, government/military, health care, independent, other?
A9	Retail/ Direct Sales, audience resembles that of a volunteer workforce…all demographics
Q10	What's the estimated size of the organization you are working for?
A10	5,000 Employees serving 3 million Independent Business Owners worldwide.
Q11	Can you tell me a Web Based Instruction project you are very proud of or got highly recognized?
A11	That was a basic selling skills course. The instructor led version that we built was three hours long. We had to put that into a Web Based Instruction. The Web Based Instruction boils down to close to about two and a half hours. We broke that up over the course of nine mini courses. It is a sales process, more of a soft skill. It's still a process.
Q11a	How many team members in the project?
A11a	I was one of those six. One of the main members was one of the managers of instructional design. It was her and I from XXXX's standpoint. We were the core people from XXXX. The other four were contracted through a vendor. This was an instructional design house out in Utah. We worked remotely. They provided a lead instructional designer, a project manager, a graphic designer, and really kind of main developer. They do follow a process similar

like essentially an assembly line, right. Basically, at any given point probably ten different people working on it at their location in Utah. Those were the people that were on the project. We did not develop the core of that, it was done by an outside vendor. We were doing the coding in Lectora. My responsibility was all the analysis as well as the high and low level and storyboard design. I did all the instructional design on it. I was the lead instructional designer from our standpoint. Essentially, I had a counterpart that I would work with.

Q11b How long did it last?

A11b One year.

Q11c What was the project about, was it about how to complete a step, process, use systems, or how to perform physical jobs, or change attitude/value?

A11c It is about process

Q11di Describe the project in a very high level (the process by stages)

A11di I will start with the analysis stage first. Strategically, it was requested by upper management, executive level management, that the retailing aspect of our business moves forward, or rather the retail sales increase. Based on that direction, we had some hunches are, "Okay well, why do people recall products," why aren't they selling these things. Based on that, we started first looking at numbers to verify that they are not recalling products as expected or desired, from our standpoint. We looked at a number of factors. We looked at essentially their line management, our communications. So I was talking about from a vertical standpoint, do they know that they should be selling product. Because our business model you can make money three different ways. You can retail products just like you would expect a consumer to pay a store that makes money above and beyond their cost. Well they are also compensated based on how much volume – how many products move through the business. It doesn't always have to come from retail sells, which means that part of this model you can earn a little bonus or money back based on different purchases that they use themselves. The third way is that by you teaching other people to do the same thing. The same thing being that, try the products yourselves, become familiar with them, sell them to other people. Just like any sale organization, you are rewarded based on your performance, as well as money. So you look at all the dynamics to say, "Hey, do they understand that part of the equation," which they didn't. They always understand the amount of money you can earn from retailing, the products have a more traditional business model, as opposed to just using products and sponsoring them and people using the products, as well. So that all really came from the main office, phone interviews, and then we would verify those phone interviews by going interview but not behavior. It was a problem analysis process. So then the other part of the analysis is finding out who are the master performers that we think that everybody should be leaning towards. We began looking first at sales numbers from our place, from our offices, to identify them, and then follow verification interviews with their line management. We say, "Hey, are they really selling these products?" Then after we interview them, we find out how they are retailing these products.

There is essentially our task analysis and then what we do is look at that data and compare it against the more traditional sales models that are out there. That was really the analysis phase, so everything from gap analysis to verification to write down the task analysis, all documented. Documentation is about everything from electronic surveys before meetings, to write down the audio and video reported system. Then the design phase, we start with a very high – what we call a high level course, whereas the high level course lays out the goal of the course as well as terminal objectives we want to achieve, with a propose sequence of those internal objectives. That was really the high level piece. From there, we went to mid level which takes all those punch so we started catching enabling objectives, internal objectives. We start sequencing proposed learning activities. The learning activities could be not necessarily detailed down to the storyboard level, but essentially to reach enabling objective, just exercise – this is the overall type of exercise. It could be a matching exercise of fill-in-the blank exercise. We would attach context to that and put that in sequence in our documents so that we could review them with our subject matter experts.

Q11dii Describe the project in as much low level (steps, tasks) as possible

A11dii From the middle level design we move down towards that low level detail design document which is more of closer to a storyboard, a screen by screen storyboard. So at this point now we are starting to see, "Okay, on this page these are the words that... We can't really stay this is a type of graphic. Well if we had a graphic we would drop the graphic in there. We used a PowerPoint to storyboard out. I mean this is probably the other piece I would note, is it all a very… process. We're talking two or three storyboards.

It was a vendor who was doing the development for us. So they would actually provide a delivery schedule. So it's not just they would come up with a storyboard and completely produce this and then send it over. From their standpoint, that's where the graphic designer comes in. They start conceptual look and feel, mocking up wire frames for the interface. We begin turning over our brand guideline, select and use images as well as any images or videos that were identified earlier on in the processing, "Hey, this could support this learning activity," if it was video based or some imaged based thing. We then turn those over at this time. Both of the vendor and us provided videos and audios. I would work with them to script, as well as act essentially a producer director for the site for video shoots. Again, this is a sales course so we thought it very important for part of the learning process was to model the ideal behavior as well as model some of the behaviors that are not so desirable. We use a number of different ways, but again they would coordinate it through a vendor that they used as well as – everything from us selecting talent that they sent over. We would have audition tapes to then go out and propose a location. It was so professional, high production value, this course was. I was involved to something like video. But I'm not the one holding the camera. I'm just there directing and advising and working on the editing. At least once a week, I met with them to update. Typically two or three times throughout the week virtually, so a phone call or WebEx or they

will be sharing files over. For review purposes, they use a system by which they could upload a Lectora course. Each page would allow me to provide feedback through a tool. So if you want to envision it, the top bar had a little button that said leave feedback. When I click on that feedback link it would already populate the page I was on and then it would prompt me to say – it would also record who I was. If you're familiar with a product called Clear Course or Clean Course, it was very similar to that. It is a platform that allows me to do online collaboration. But just only from a review standpoint. It was not from a development standpoint. That was it. They did most of the heavy lifting. I was the one to sign off. They gave me a chunk of information to sign off instead of a whole piece. The next phase after that really is obviously the implementation phase, thereby which after we verify that the content is right, that it looks operating right, they then send over files to us in a digital format that we would upload to our learning management system which is a sum total, which is behind a firewall. Regarding the project features, part of the project specifications and the requirement on the vendor's behalf is to deliver it to us in a SCORM format. I think it was SCORM 2004. But we were using SCORM very minimally. We were not using all the capabilities that SCORM provides, for a number of reasons. Keep in mind we deal with the volunteer work force so it's not advantageous for us to require things or punishing them for not completing something. It needs to be a very, very positive experience. We don't have to do the configuration and we just put into LMS. We have a set of guidelines or requirements that we provide to the vendor. But given the SCORM format and the Sum Total SCORM compliancy, it is plug and play, which is the intent in SCORM. After we launched it, we began tracking who is taking it, how long is it taking them to complete it, what are the responses to the quizzes. So we are looking at completion rates, we're looking at how many attempts, how long they are taking, how many times they revisited it as well as tracking their scores. But we are not explicitly telling them what their scores are, because there is no pass or fail. From that standpoint, we are looking at that as far as the scope of the course goes, but we are also comparing those people within a specific organization. Say you are part of a sales organization over in Troy, Michigan that is based on their 30 people, and 15 of them are taking it. We will take those 15 and compare your sales results against those other 15 who did not take it. So that's just one part of it. We are also looking at your business as a whole, what is happening with your business? Is it growing or is it shirking, and what are the key performance indicators that are moving. Then we document those. We don't have to report the result to the customer – in this case it wasn't required for us to report to anybody, but we did. You got to prove your work. Yeah. It was effective. But what we are finding is that while the people that take it or the majority increase their retail sales and grow their business against those who don't, but what we're finding is that we have low completion rates. That is causing us now to start researching why are there low completion rates? So we are starting to talk to people in the field and say, "Hey, we see that you started this course. Why didn't you finish it?"

We had some hunches, but I think the nature of the business, again, is a volunteer workforce so we are competing for their time against multiple aspects. Again, they are independent business owners, so if they want to make money – just like anybody else – do you want to spend your money producing something or spend your money, in time, producing something. Or do you want to spend it learning, which you are not being compensated for. It is true that they will benefit from learning. Yeah, but not immediately, right? To address to that we actually starting tying some financial incentives to them taking the training. We actually got a little bump in there. But not as great as we should, and it is kind of disingenuous to do it right. We had to justify that just in turn with our own department. We actually looked at that and said, "Yeah, this is a valuable thing." But in our reports to the executive management, it was that we moved the needle for them on the key performer indicators based on this intervention. We didn't go back to revise and change a lot of things. Maybe just a couple of things from a technical standpoint, but from content standpoint we had not gone through the revision phase yet.

That project was in 2009.

Q11diii What event/communication marked the beginning of the project?

A11diii Again, that event was as the sales were declining, specifically retail sales were declining. The event was the managers actually saying we will fix this.

The timeline for results was three years. We did it within a year and a half.

Q11div What event/communication indicated the completion of the project?

A11div Other than us paying the vendor, no. We just celebrated. We didn't have a big celebration or anything, but we did take the results and submitted a CD for an award, which we had recognition for. We didn't win the gold but we won something else.

Q11dv What was your role in the project?

A11dv The analysis was really the interviews as well as the research. The research incorporated some of the common, more published sales processes. I did the research. I would reach out to get help for research. I would work with our internal financing department identifying who were the master performers. They keep the numbers and they can identify who the top salespeople were. I wrote the gap analysis and task analysis. Those analyses go up through our management. The manager of instructional design then goes up the director of training. They have to approve the way to go. I did everything. I was the primary designer around that. All that would then go off to my manger for review and we would go around essentially that review process. Then we work with our stakeholders and say, "This is what we're proposing for the design," and have such rationale on it. And they have to sign off. In terms of management, my primary responsibility was interfacing with the vendor and making sure things progress. Again, they had a project manager that really kind of ensured that he or she helped hold them accountable. I was the one going out of the field to coordinate activities. It is part of that belief of instructional designer position really is letting an instructional designer work as well as managing a project. It is like in the team, the manager managed me and I managed everybody else. Talk about challenges, I guess perhaps the

level of service I expected from the vendor didn't really match up with what they were providing. That's a very difficult thing to work through. It's more from the design skill aspect. In this case there were certain things that I would have expected them to do and they didn't do it, things like around scripting of a question or scripting of a scenario or interaction. I would expect a higher output. I had to negotiate with them. There is actually a couple times where I had asked them to redo the work. There were other times when I just did it myself and said, "This is how you should be executing it." Prototype of process was part of their processes, really incremental standpoint. So the graphic designer would essentially come up with a graphic for the same theme as well as the wire frame and navigation and functionality. So when we were putting content in for the first go around, in the first process, things might not be the right image. It might just be a box of the description of the picture that's supposed to be there or the video is going to be there, and then we said, "Hey, yeah this content is right." We took it from the standpoint that content is king, not the fancy fonts and clip art. I approved the prototype and management above me. Well, the implementation, we actually turned that over to our learning management system administrator. We would put the course up and he would launch it himself. I never actually have to go into LMS. The training result data that we can go get in the LMS that was provided to me and then I would in turn coordinate with our internal department such as finance or registration to get the other metrics.

Q11dvi What software and services were used?

A11dvi Again, the whole Microsoft Office suite, really everything from Excel to Word to PowerPoint, and then Lectora, Flash, full motion video, Photoshop, Adobe Illustrator, stock photography and custom photography. I hated Lectora. That was our corporate government saying that, "Yes, you must use Lectora." They wanted that done. We have since moved away from it.

Q11dvii What hardware and devices were used?

A11dvii It is PC based nothing special.

Q11e What were the outstanding features of this project?

A11e Oh sure. One of features is pre-post confidence assessment coupled with selling scenarios facilitated via video. So rather than do a pre-imposed test around their skills, which would be negatively viewed by our audience, we really want to – "Okay, what else can do to distract where they are before they go into the course and where they are immediately when they come out of the course." We said, "Okay, can we gauge their confidence." Because the lack of confidence will have a large impact on your performance in a job or some sort of task. We found value and gathered that type of data. That was really cool. The other cool part was actually doing the integrated full motion video scenarios into the course. These were necessarily branching scenarios as much as they were things showing me a video and saying, it was a bad video and asking the learner say, "Based on what you saw what is your knowledge previous to the course. What do you think went wrong here? Did this sales representative make the right choice or the wrong choice?" After that we would show them the right way, the right video. So gave them chance to

think about it. It was just a different way to engage learners cognitively, rather than sit back and watch the perfect way to do everything every time. These scenarios were not of high risk, like launching a space shuttle. It was just saying, there is low risk both from a result standpoint and from a personal or confident standpoint, to engage in that way. There were some interactive exercises that worked with the video. It was everything from compare and contrast your answers to multiple choice to drag and drop, the whole gambit kind of thing, even just a couple three level branching scenarios. We are actually doing a lot more video right now. Typically, we use professional videographers. The nature of our business to be very public facing. It kind of requires that image maintenance. But we are doing some more lesser quality things, I guess you would say, or more still images second siphoned through production value and it's good enough. That's a big challenge with us, is that good enough or does it need to be a high end video. Loading large video files which may be very slow, but not really, because what we did is rather than launch a video full screen, which if you want a descent quality video and you launch it full screen that would be a problem. These video windows are relatively small and low timing. We had coding in there that would actually start preloading a video before you go to it.

Q11f Did it occur to you that you wish to have done the project differently?

A11f I don't like when I have used a vendor. Again, I probably would have done it myself. That's probably one of the biggest things. I would not use a vendor. I would just do it myself due to consideration of saving money and speed of market and those frustrations. I think in part they were a disadvantage because of the distance. But more over just to be honest, it is poor performance, the things that unexpected and instructional designer to provide, just the developer to provide. It was a lengthy course which was two and a half hour. It was just too big. Again, we deal with the volunteer workforce so it's hard. It's hard to get their time. This is a part-time job for them. They spend maybe eight hours a week on something like this, on average, on this type of business. If I ask them to take two and a half hours out of that eight hours, taking them away from their sales and other business meetings, that's a lot of competition for not immediate results. I did give some incentives, it helps. It helps. I think the jury is still out as far as whether or not that's helping their business. It helps drive them to take the course. I necessarily agree with some of the results that we're seeing.

Q11g What were the solution(s) to the challenge(s)?

A11g Regarding length of training, we are actively right now breaking those down into some more video byte size discs that are perhaps more digestible. As far as the vendor, the solution around the vendor was essentially having what we call a come to Jesus meeting, with our management saying, "Hey, you guys are screwing up. We're experiencing some pain here." I wish they had acknowledged what was fixed, but they did acknowledge it. The other part of that solution with the vendor was just simply for us doing that design work, more of that design work.

Q12a What specific knowledge, concepts, and ideas that helped you?

A12a I was driving pretty hard earlier in my career Gagne's model. The other one I kind of took a liking to was Kelly's ARC's model. Attention, relevance, confidence, and assess, right? I built learning event model and strategy. There was probably some message design and graphic design principal like around – I'm trying to think – proximity, color choice, contrast or the contrast going on, repetition, alignment.

Q12b What soft skills did you use?

A12b The people that I interviewed are primarily subject matter experts, field representative, master performers, those kinds of people. Those interviews were important, yeah, from content gathering to verification, just overall these are the people who were going to be part of the project and I work with them. The interviewing skill is not just asking the right questions. It's really edifying those who you are working with, praising them for what they do kind of thing. It's how to win friends and influence people 101. We are looking to them to learn their expertise as well as verify with what we're researching. Weekly status reports, emailing back and forth around content clarification, holding designer review meetings, so that's including the manager of instructional design, it could be my director of training development, as well as other key stakeholders within our organization. We internally we use Microsoft SharePoint to manage the project. It would actually house the timeline documents and subfolders and everything. We didn't necessarily use it as a project tracking tool. We really kind of relied on the vendor to do the project management, because they are a team that really has more equal work than just myself and my immediate manager. But again, yeah, part of their communication tool was using – from their standpoint for a review tool – I think it was Clear Course or Clean Course type of product that they developed. Other vendors I'm finding lately leverage website service software called Base Camp. It is an online project management tool.

Q12c What hard skills did you use?

A12c Yeah, it's not necessarily having the skills to develop, let's say if you use Flash to its full intent or do you use Lectora to its full intent. I think you need to be very aware of the capacities of those tools so that you can design a proper interaction that is going to further learning. Beyond that, also to understand what type of environment are you working in, understanding the technical capabilities of your LMS, your deliver system, your server, as well as your end users. Because our end users, we cannot dictate what they use. Again, this is volunteer workforce so they can be working on anything from a little Pentium II to the latest and greatest Intel chip, everything. We essentially had to really make – I don't want to say dub it down – but we have to cater to a very low common denominator. That's not evident if, let's say, I'm working in MMM. Say, "MMM, I know a typical machine I can build towards – in thinking outside of the box on how to handle some of those technical problems. I'm going to pick up a different company I served, SSSS, which is a special equipment manufacture association, out in California. I built them a sales course, as well, that was very video heavy. How we addressed streaming video was actually we purchasing third partner company

that would physically host that video on service throughout the country. So that if I'm in Michigan I would be served up that video from a physically close location with high technical capabilities, as opposed to the homegrown LMS sitting in Diamondback, California and SEMA's servers. So SEMA is only serving up the text while that video is actually being pulled in from a third party. Like YouTube, like you would leverage a YouTube video. Having a knowledge of those kinds of things I think is very critical when you're developing Web Based Instruction. Not necessarily the skills to do it, but I can say if you have the skills to do it you can tell it whether if your vendors are bullshitting you or not. Just because I can doesn't mean that's the right thing to do. You have to timeline your sources. You can't optimize all of them, maximize them rather. That's why we have vendors.

Q12d What attitude did you realize that was helpful for the success of this project?

A12d A positive attitude, our business is very motivational. Our audience, again when in design you got to look at your audience. Your audience is first and foremost as opposed to your own agenda. Our audience is a very positive environment. They will shut down if we come in there and say the beginning of training, "This training is being produced because you are failing." That is not going to go over well. It's not going to go over like it would in a corporate environment and more of a vertical organization as opposed to a horizontal organization which is... Yeah, we need to be very positive. We need to throw them the softball, essentially. When some of the vendors went negative, we just make fun of them. Yeah, it's like anything else, it is what it is and you move past it. The greatest thing about our company is that the values from which our company was founded on that we live gauntly, it makes you feel good. I never worked for a company before that I felt this good about serving my learners. My learning and the training I'm developing is actually changing people's lives. They are able to spend more time with their family or put their kids through college or maybe their wives and husbands out to dinner just a little more often. It is making a difference. Keeping an eye on that really helps us out when we are designing development training for XXXX. Attitude is probably one of the number one things.

Q13 Which year was the project? What do you wish to have known that you didn't know back then?

A13 I wish I would have gone with a different vendor. You can see a trend, can't you? I wish I knew more about the field, more about audience. Because again this is a volunteer workforce, it's extremely dynamic. Yeah, the more I would have known I could have been perhaps a little more diligent/realistic at some of the scenarios that I built. So really having that true understanding of whom I am designing and developing for. We got the information about our audience from our managers. But it's not like firsthand. We did focus groups, but again it's – it's just these little secrecy you hear everybody, and this is a new arena for us to go into. The design and developing and training for the field is a new task or a new gamble for the company. There are some growing pains organizationally. My management actually had 15 years of experience

in the field, as well as a very strong analytical experience. She did look at numbers and really interpreted the true meaning of numbers and what's going on. Yeah, with that kind of experience or knowledge, it probably would have streamlined things. Because from a personal standpoint, you always go to your manager and ask them for questions, you have some self doubt going there. For the other skills that she has and I would like to have, I think perhaps probably some more experience in statistics. Yeah. I think in looking at some of the research, I was having some trouble interpreting that fact that correlation is not always causation. I think I was quick to jump to conclusions around some numbers, whereas she would say, "Hey, look at these other numbers, that's indicative of something else is going on." Again, just the experience and her field but also her ability to look outside what was presented.

Q14 What are the other knowledge, skills or attitude which were not used in the above project but you used in other Web Based Instruction projects you led?

A14 No, I don't think so. I think maybe…I was thinking maybe the ability to sell my ideas better, which is the key when you are working with any… Yeah, so if I'm trying to convince my management that this is the way to go and we are at a disagreement, how do we get to an agreement. That can be a difficult thing to do. Yeah, it's kind of a selling skill. We used EPSS in this project. But other projects aren't necessarily all around a process. Some of the other projects are more around knowledge or access that knowledge at just in time basis can be very helpful.

Q15 Assuming you are hiring a person as a beginning instructional designer in Web Based Instruction, what skills are you expecting?

A15 Again, just probably sound instructional design skills, just really the basics, at least knowledge of capability tools and what they can produce in a more inquisitive nature, not to be just an order taker. I worked with too many designers and developers and they are just an order taker. Tell me what you want on this course or how to structure this course, as opposed to really think it through and increased learning and retention. In communication skills I would probably say those are the core, professionalism. Yeah, just from an instructional designer standpoint, some of the basics and at least knowledge of what tools can do, because you can always learn some of those things if you are a beginner. I mean you got to know all the other stuff like Microsoft Office skills, good communication skills, reliability, showing up and that kind of thing.

Q16 Assuming you are hiring a person as an experienced instructional designer in Web Based Instruction, what skills are you expecting?

A16 Oh yeah, probably all of the above in more detail. Someone who can lead and sell their ideas and probably more better communication skills, as far as providing direction to others. More experience is probably going to have a positional power over someone else perhaps or being expected to lead someone else, also the ability to implement a process or at least adhere to a process. Solid education for instructional design is absolutely necessary. Again, if we are talking at a degree level…bachelors, not to discredit the

Master's program. I don't necessarily put a whole lot of credit into a Master's candidate as far as employment standpoint, as much as I do what results, have they yielded in the past, true business results. I have worked with too many academics in a professional setting who simply cannot yield business results. They have to come to the table saying, "We move these metrics." So I'm interviewing them, right, if they said these things I would also follow up or ask them how they did it. They have to prove it, the ability to prove they did that work.

Q17 Which direction do you see Web Based Instruction is heading to?

A17 More byte size, I think more video per basis, I think mobile. That probably goes without saying anything. I think we are going to find more Web Based Instruction pervasive and easier and accessible. So it's going to be more of a pull as a top down push. I think there are going to be technologies and implementation techniques that are going to be right in front of you.

One thing is more convenient but also the other piece is going to be more in your face. So if you are working with a system and the system is seeing that you're placing an order for something specifically or you're not doing something, something is going to trigger and say, "Click here to learn more on how to do this or learn how to sell this product. We notice that you had a return on this." This is kind of a retail hat. But even in a production environment, if we see that the logic can be built in it and say, "Wow, I see that you have come to this help page for the third time in a row. Click here to view the training steps." I don't see this is happening, because that's expensive, isn't it? It is very hard. But I think we are getting there. At XXXX, we are actually developing some tools right now being part of a three year project around some of these more advisory type of tools, where the system is analyzing your business and your actions and it will alert you, "Hey, we notice that you are just ten products shy of the next big bonus check," or something like that. It lured you. If you're lured of this, what do you do? You go and check out, what do I have to do to do that and achieve that. That's where the training would come in. It's kind of neat and I am part of this project. Because we view training actually there is viewed as an added value, a competitive advantage because our training is actually getting better and better and better and getting more accepted in their field as opposed to say NNN or HHH, than some of our competitors are. We do have a competitive edge, so we don't let those things out just to anybody. But if you sign up for an infinite business owner you can do that, its $56 a year. I am really impressed with it. We have a different business plan and a different compensation plan which is actually an unlimited compensation plan. You aren't limited to – people that you sponsor and the more you sell the more you get compensated. You move up in different bonus brackets.

Q18 What do you think an instructional designer should do in order to keep up with this direction?

A18 I think maintaining – keeping up with trade publications, new research, new technologies and plugging into other arenas of technology, not just your own. What I have been watching as late is some of the social media technologies,

so the collaborative technologies, either like blogs or other case management portals. The pains that I experienced when designing and developing – the designing and developing standpoint is almost easy to me, it's not that difficult. What is difficult is managing the project as a whole, managing different people, coordinating different people, relying on different people. I think the more that you stay current with that type of skill, which is obviously a soft skill, the better off you're going to be. I can pay a vendor to develop something for me, but it's more advantageous to me and it's higher paying to me to be able to have those analytical skills, those design skills and communication skills, as opposed to the coding skills. Because if I can spike it out and storyboard it out, I can send it to India and have it done for one-tenth of the cost than here in the United States. I could make a ton of profit on it. It is, just playing with tools and a lot of reading. I like instructional design because it's kind of a blend between art and science. The arts standpoint stands really for that message design history, the graphic design history of ID work. The science brings it to standpoint about what we know about what the brain can handle in the center. I've gone to ASTD a couple of times. I really want to go to more ISPI. I like the chapter ISPI meetings than the ASTD meetings. You can see more of a performance consultant level. I would just go to the local ones. Our management is pretty decent. I travel a fair of bit. It's not a big deal.

Q19 Anything else that was not covered in our conversation but you think is important?

A19 I guess I have been lucky and really passionate about doing this. I guess it was 1996 when I started working in ID. I really, really enjoy it. I really can't see me doing something else that doesn't involve this or doesn't involve the skills that I learned. I have somewhat a passion for education. Both myself and wife have become a life partner who has this type of interest is very helpful. I believe that the instructional design field can help beyond the corporate and kind of enter into more of the public arena. I think it's hard to argue against it. Here in America we have a failed school system that is built off some very old industrial age models, where us as instructional designers – someone like us would come in and look at what is going on and be able to craft different solutions more customized individualized instruction that would be far more productive and maybe cheaper than what the public school system is doing right now. Yeah, I think the public school system has failed us as a generation. Unfortunately, that translates into corporations suffering, for what that's worth. Anything else? No, I'm cool. If there are any other questions, feel free to jet them to me and I will respond pretty quick.

Transcription of Interview 009

Q1	Good Afternoon, thanks for taking time with me. Can you tell me your current job title?
A1	I am between projects right now so I don't really have a job title. My last job title was Instructional Design and Technical Writer.
Q2	How long have you been working in the current position?
A2	That was a short term assignment for about three weeks, that was with XXXXX.
Q3	What's your age range: 25-35, 36-45, 46-55, and 56 above?
A3	46-55.
Q4	Would you say you are actively involved in instructional design?
A4	Yes.
Q5	Are there any other positions have you held before, that were related with instructional design?
A5	Yes, prior to this I worked as a Training Developer and Stand-Up Instructor for XXXXXX University and then prior to that I was independent contractor doing a couple of assignment for XXXXX Hospital and XXXX Hospitals, XXXXXXXXX Services. I have had a number of Instructional Design positions well even before I graduated from Wayne State in 1998.
Q6	How many years accumulatively do you estimate you have worked in design/development for WBI?
A6	12 years or so.
Q7	In those WBI projects, how many years, accumulatively, do you estimate have served as a lead instruction designer/developer?
A7	I would say maybe four years, depending on the project.
Q8a	What's the major of your bachelor's degree
A8a	I have a Bachelor's degree in Bio-Medical Communications. That is why I am all focused in the medical background.
Q8b	Did you have postgraduate education: Master's, or Ph.D.?
A8b	I have a Master's degree from Wayne State in the Instructional Technology Program**.**
Q8c	Have you had any other training on instructional design?
A8c	I have had various computer/software training, and I have been certified by the GM University in Distance Learning.
Q9	What's the business nature of your current organization: business/industry, education, government/military, health care, independent, other?
A9	Well my last project was with XXXXXXXXX which is a Health Insurance Company.
Q10	What's the estimated size of the organization you are working for?
A10	Good question, fairly large company, I would say at least 1200 employees, I don't know. It's local, it's part of the XXX Health System, it's their insurance branch.
Q11	Can you tell me a Web Based Instruction project you are very proud of or got highly recognized? First of all, describe briefly what this project is about?

A11 Okay, I was tasked with converting an instructor led course to Web Based Training.

Q11a How many team members in the project?

A11a On this particular project, I am talking about the project I worked on with XXXXXX University, we had about 16 to 18 training developers. It's the biggest project of its kind for XXXXXX University. They are all developers. We had people developing instruction through various methodologies, self-paced, webinar, instructor led and web based training. We were all designing courses, I was tasked with developing three courses myself. We had like 25 courses and I was involved with 5 of those 25 courses. We had subject matter experts we referred to. In this project, we were calling them Instructional Leads. I had 2 Instructional Leads that I reported to and I would say, depending on the course, 2 for every training developer so I would say close to 24 or 25 subject matter experts. This was the biggest project of its kind for XXXXXX University. We were developing instruction for a new financial software package. We also had courses related to a New Human Resources software package. And an SAP Branch as well. We had 25 courses in the financial package and I would say 5 or so Human Resources courses with about five more in the SAP. We started training in September and didn't really finish up training until I'd say early February. We had thousands of people across campus, everybody from Administrative Assistants to faculty and Deans that required this training. It all depends on how they were mapped out by their supervisors by which felt they needed to be enrolled in. None of them were mandatory but they were all leaned upon heavily to say you are going to be using this software package whether you like it or not, so you better learn how to use it.

Q11b How long did it last?

A11b The planning stages started maybe 2.5 or 3 years before we actually brought onboard some of the training developers and started actually doing the training. It's a big university and things sort of ran slow. Three years from the initial stages all the way through to the end. I was involved with the project for a little over a year myself.

Q11c What was the project about, was it about how to complete a step, process, use systems, or how to perform physical jobs, or change attitude/value?

A11c Everything, because depending on what they did at their job, at the very levels of expertise with the new software.

Q11di Describe the project in a very high level (the process by stages)

A11di There were many stages that were worked on before I came onboard, in terms of my work, I was tasked with outlining, developing, reviewing and implementing, evaluating. Well, instead of a design, we basically stuck to an outline for each course. It was more design for me as well as some development and also testing. It was constantly under review by supervisors and peers. I was involved and had to go back and follow up and revise accordingly.

Q11dii Describe the project in as much low level (steps, tasks) as possible

A11dii Again I was given an outline template, then I would talk with my subject matter experts about what it is we wanted to accomplish with this course. And then I would go in design, write and submit to these subject matter experts at various stages making sure I was on task. It would be constantly reviewed, not only by my supervisors but by the subject matter experts. And then we would take that and translate into the delivery method, be it self-paced which was essentially PowerPoint or a webinar, which would involve scripting, producing the visuals of course. Then we would do the dry run. We do present it one more time before taking it out to the public, the actual learners. During the whole writing and design phase I was under constant review. I was involved with those courses on my own. Again, I had people review them and I would talk with other training developers because they were developing courses that were either, before or after my course and I wanted to make sure there would be smooth transitions between my courses and their courses. They had, it's almost like an organizational chart to read that laid out the courses. Depending on again, the learners were mapped out regarding their job responsibilities, they would take courses accordingly.If they needed 6 courses, they would branch out to those particular courses. Nobody necessarily took all of those courses, although they were all available. Well it makes sense to essentially go over the prerequisites. There were certain courses that were mandatory so to speak, and you'd go through those courses and get basic knowledge of what the learners were doing before they came to your course. I guess you could say that was part of the analysis, leading up to the course that I was developing. I develop the content of the course with subject matter experts. The gleam from the title of the courses was what the subject was. Again, if you wanted to see what courses were coming up before your courses and any courses that were after just to make sure there was a smooth transition and things would tail easily with each other. Again, it was reviewing their courses having them review the course. It sort of broke down the course in various steps or chunks. Sort of like a design template. Some of the courses are highly specialized, some are quite advanced too. We had a facsimile of the application itself, something we could play with from which we would take screen graphs and do step by step processes with SME. We pretty much laid it out in PowerPoint. We didn't really have storyboards. A lot of them were delivered in PowerPoint format. Again we used methodologies, the soft based course were all paged through the power point, we also had webinars which we used PowerPoint as a basis for the visuals. We had our subject matter experts in with the webinar. We recorded each webinar. I was the one writing the script for the webinar. I was a moderator for every webinar that I wrote. We had PowerPoint for some of the high level learning points, and then we would take them through demonstration of particular tasks using the application. Again this was recorded so they could go back and review it when necessary. I also did the communication. I was the one in charge of setting up the webinar, I was actually the on-air talent so to speak, and I would answer questions that I could, but we also had a subject matter expert there available to answer questions that I couldn't. We had questions built into the webinar

that they could respond to, and we also took questions from the audience. They could answer their questions right away, and we answered their questions, any questions we couldn't answer right away we got back to them via email. We did two webinars for each course that were designed as a webinar. They are the same content. We would sometimes alter the content depending on how the first webinar would go. There wasn't much implementation. We just put it out there for them. We organized these courses like a curriculum. XXXXXX University uses a system called Angel. It's an online registration system. The university already had that set up. It's their LMS system. We had our own learning management system for keeping things like our graphics, various versions of the courses we were developing. We used SharePoint for that. So we continuously update the status. What kind of the data that we were tracking? Again, various versions of the course, our questions, the graphics we would use. This was all within SharePoint. We didn't get to that kind of granular detail to report when and where. We had deadlines we had to meet and we had various phases. Deadlines had to be met on a regular basis. It's not like one final deadline. We had to have the outline complete by a certain date, we had to have our first stage of the PowerPoint done by a certain date. We had some training leads, sort of like Project Managers that were in charge of setting the deadlines.

Q11diii What event/communication marked the beginning of the project?

A11diii There may have been but it happened before I came onboard. So when I came onboard, I just picked up and started working on it. I was among the first people of training developers to come onboard and we were automatically tasked upon, here is the outline and these are your courses based on your previous experience, or other projects you've worked on. They gave us material to read, some hand out projects. They were nice about easing us in.

Q11div What event/communication indicated the completion of the project?

A11div They were continuing to evaluate, particularly Human Resources and SAP that were ongoing – well for a little bit after I left. Maybe even after I left there were still revisions because they are always getting new employees and new employees are going to need training on the system.

Q11dv What was your role in the project?

A11dv That was designer, developer and instructor, moderator. I don't have to do any management of things. We had supervisors to do that.

Q11dvi What software and services were used?

A11dvi They sometimes brought in outside contracts, I was an University employee when I was on this job, but occasionally they brought in a couple of contractors to help out with writing or some other things, technical support. They were there for like three months at a time. They would help to write the design document depending on their expertise, they would technical support or come in and write for a particular subject like Human Resources, hiring, firing those kinds of things. Not so much administrative support but actual instructional design, sometimes. I didn't do coordinating myself but there were other training developers that did have to coordinate with those people. Again what kind of coordination was depending on the courses that we were

developing and who were the contractors. Depending on the course the contractors were developing, the other courses, the developers would have to coordinate, make sure everybody was on the same page to make sure there were smooth transitions between the courses. Regarding software, we used a lot of Microsoft Office, Adobe Connect, SnagIt, SharePoint, and Visio. That was pretty much it. We didn't develop a sandbox for the learners where they could actually use a facsimile of the template to play. We did have courses, they could practice with a version or like a facsimile but only within the confines of the course. This is an instructor led course, we had a number of exercises that they would go in and they had certain parameters. This was the only time they could actually play with a practice version of the application.

Q11dvii What hardware and devices were used?

A11dvii It was all PC based.

Q11e What were the outstanding features of this project?

A11e Good team work, we had a great team for this project. Everybody helped each other out, there was no competition and everybody was very cooperative. There was a very strong team effort. Everybody, including the developers, team leads, subject matter, they all realized we were in this together and this was something that was going to help the university as a whole. Other than the team work, we stayed on task, we always got good feedback. We had an online survey for every course, and of course you could tell if you were an instructor on the instructor led course how people would take to the course content. That's pretty much the highlights. It was a good project, lots of good people to work with. I am sorry the university didn't keep us together to work on other projects.

Q11f Did it occur to you that you wish to have done the project differently?

A11f It would have been nice if we did indeed have a sandbox for them to go in and play on their own, but they just didn't have the finances to do that. If I had opportunity to design a sandbox, I would have a practice application out there where they could try practicing their own real life situations, so it wouldn't necessarily affect the real system. I am talking about something that they could practice at their workstation. Like I said, the only other opportunity they had to practice was within the instructor led course.

Q11g What were the solution(s) to the challenge(s)?

A11g Again we told them that, for starts webinars, they could look at demo. We also had practices, but we also had certain tasks on a website on the internet at the university where they could practice with certain tasks. I am trying to think of what they called these. They were simulations but they could sit there and watch or they could do step by step on these various tasks. These were set up with a program called U-Perform. So it's like a small piece of sequence of screens playing in front of them and they could also do certain tasks themselves. They were given direction on type your name in here, click on this. If they did it correctly they would follow along to the next step. I think that would add to software, the U-Perform.

Q12a What specific knowledge, concepts, and ideas that helped you?

A12a Well of course instructional design, training development, of course having access to subject matter experts for financial knowledge. Writing of course, some of it would be technical writing. I used the ADDIE model.

Q12b What soft skills did you use?

A12b You had to have good inter-personal skills, not only to talk to subject matter experts but to also be an instructor. You present enthusiasm and proper body language, and so on and so forth. We didn't have video capability, what we did was we simply projected the thorough points and we would sometimes switch to a computer screen where we demonstrated the application. During the stand-up instruction, we used proper body language. So this is blended, it has both outline, virtual and classroom training. All sorts of different methodologies. Again self-paced, webinar, instructor led training and web based training. Well being a good presenter, showing enthusiasm for the topic you are trying to teach and being helpful and understanding with any and all questions to be able to effectively demonstrate the product. I mean excellent presenting skills. Well that's basically it.

Q12c What hard skills did you use?

A12d Yes, computer skills were real important. The writing. Organizational skills. Resources, organizing your courses and sometimes you are working on multiple courses at a time, multi-tasking skill. I was working on three courses simultaneously.Two of them were advanced courses. It was assigned that way.

Q12d What attitude did you realize that was helpful for the success of this project?

A12d Good attitude of course, helpful, I want to accommodate my subject matter experts, their schedules, because a lot of times they were working on their own job, as well. Well just a Can-Do attitude. Be willing to get there as early as you needed and stay as late as you needed. Just having the proper attitude to do whatever needs to be done.

Q13 Which year was the project? What do you wish to have known that you didn't know back then?

A13 It was 2010 until 2011. I would have liked to have known more about the end users. Well they sort of did tell me upfront but it would have been nice to have actually gone in and talked to some of these end users. So I wished I would have met a group of users and observe them that would have been nice. I would have just liked to talk to some of the end users just to get their take on their skill levels, what their attitudes were, like what issues and problems they are having now. So I didn't get an opportunity to talk with any of them, not until we actually got into the instructor led courses. That's kind of a bit too late.

Q14 What are the other knowledge, skills or attitude which were not used in the above project but you used in other Web Based Instruction projects you led?

A14 I'm still waiting for the opportunity to learn some of the more advanced applications such as Flash and some of the other web development tools out there. Those are just personal things I would like to be able to get involved with.

Q15 Assuming you are hiring a person as a beginning instructional designer in Web Based Instruction, what skills are you expecting?

A15 Excellent writing skills, excellent communication skills, willingness to learn, basic computer skills, message design. And the ability to speak about capabilities things are even if they haven't used particular tools such as Flash or DreamWeaver or any of those things. But they should have an idea of what it can do. I'd like to think that they could be able to provide some good work examples. Previous teaching experience would be nice. To understand things like adult learning.

Q16 Assuming you are hiring a person as an experienced instructional designer in Web Based Instruction, what skills are you expecting?

A16 The ability to create good web pages, perhaps a little bit of online animation experience, maybe some video editing or audio production, or multimedia skills, like media production experience, management experience, project management experience, and people management skill as well. They should be at least a Master's degree, or more education beyond that PhD or EDD. Specific years of work experience may not be for the project, but it would be nice to have had two or three years experience.

Q17 Which direction do you see Web Based Instruction is heading to?

A17 More simulation, like Flash or video or any kind, hands-on simulation, and more job related. It depends on the budget of the project too, in an ideal world where expense just didn't matter, it would be nice to have all sorts of WiskBang, animation and simulations, practice sessions, sandboxes.

Q18 What do you think an instructional designer should do in order to keep up with this direction?

A18 Well there's always various web development applications out there that are changing all the time. Being familiar with Adobe Creative Suite would be helpful and programs like Flash, if you don't use them constantly, you are going to lose those skills. They are always changing these applications, too. Adobe came out with new versions of Dreamweaver and Flash and all these applications, and if you don't stay on top of it, or you don't have a company that is willing to pay you for the training to use them all the time. Microsoft Office is changing all the time, too. They keep adding features for the way the interface is operating. Some of the basics like being able to copy and paste and use a thesaurus. You should stay involved with a professional organization as well. As long as you are able to afford the membership dues and the cost of each meeting. They are all national conventions. I haven't been to many lately, when I was on the project over at XXXXXX University we didn't have any professional branches in the area. I'd sign up for various groups and I will take a look at the discussions on LinkedIn.

Q19 Anything else that was not covered in our conversation but you think is important?

A19 It would be nice if companies realized the importance of training and how we help not only the companies but the end users. We are part of a process that's involved in prevention. A lot of times it's more cost effective to throw your money toward preventative means rather than fixing problems once they arise. I'm just tired of the process of being a contract worker, I wish some of these companies realized the importance of hiring a full time training department.

Lots of companies are that way, that's why you don't see training department in every company. Ideally I'd like to get back into XXXXX Support working with either a major medical center or medical school helping them out with their training needs.

Transcription of Interview 010

Q1	Good Afternoon, thanks for taking time with me. Can you tell me your current job title?
A1	Yes, I am in leadership of professional development which means I am working with management in developing management competencies
Q2	How long have you been working in the current position?
A2	About four years
Q3	What's your age range: 25-35, 36-45, 46-55, and 56 above?
A3	56 above
Q4	Would you say you are actively involved in instructional design?
A4	Absolutely
Q5	Are there any other positions have you held before, that were related with instructional design?
A5	In some degree every position I have ever held has been involved in communications, communications in product knowledge, product sales training earlier on in my career to now more formally skill development since 80s.
Q6	How many years accumulatively do you estimate you have worked in design/development for WBI?
A6	Really became involved in web based starting about 1997, and in 1998 I came in board with a media company they were specifically developing interactive technologies at that time beginning in CD-ROM based, you know program based interactive content and then moved over into the web based material. In that context style, I worked very early on with this SCORM development and then participated in what it used to call PlugFest, a SCORM, we would go in and experiment with a new set of standard, so I was involved in early development of SCORM, I was there when they were writing the standards.
Q7	In those WBI projects, how many years accumulatively do you estimate have served as a lead instruction designer/developer?
A7	All of them. I came over from interactive CD-ROM based development, so coming from that direction moving into web based, I was already well seasoned in the kinds of technologies that were utilizing
Q8a	What's the major of your bachelor's degree
A8a	Undergrad degree is fine art, my graphic artist my formal education in undergrad, and that was before computer graphics, so we are talking painting, sculpture, drawing.
Q8b	Did you have postgraduate education: Master's, or Ph.D.?
A8b	I got involved in business education, business theater, started working with interactive technology in presentations. So back in roughly 1980s I worked on one of the first interactive media discs for YYYY, a big disc, there were like four phonographic records, besides video disc, they were interactive. I would say the first interactive disc for automotive training, that was 1981. I got my Master's degrees in 2001. And the reason for really going into formalizing training is because the clients were more highly educated, I needed to go back to take the formal education to be able to communicate

because I was very much involved in writing proposals and developing basic and creative side of the work. I need that background to be able to communicate with the clients. I have completed all coursework of my PhD program, and right now I'm in the process of qualifying for the doctoral candidacy.

Q8c Have you had any other training on instructional design?

A8c I don't have any other certificates. But as I've mentioned before working very early on as the technology was forming, they wouldn't do certificates as we were still defining what was SCORM standard. So it's not like you can certify something you still evolved them. So it hasn't been important for me to go back and to be certified in those things. I have been consultant of teaching others in those things I have been called upon. I have done some training in SCORM and the implementation of consulting in that area.

Q9 What's the business nature of your current organization: business/industry, education, government/military, health care, independent, other?

A9 Manufacturing.

Q10 What's the estimated size of the organization you are working for?

A10 It's a good question, I did look back and find the number is 166,000, so it is a big company. It is a global organization, we are going to get to that. That's very difficult to identify the size of our group, I don't think anyone has a very solid head count. Even with the HR and I am part of HR, each our organization…it is split into formal hierarchical structure HR and then there are people in HR who actually embedded in the individual skill team, like HR people in manufacturing, so its reporting structure and how it is organized sometimes is difficult to get the straight number on that. The group I am in is about eight people.

Q11 Can you tell me a Web Based Instruction project you are very proud of or got highly recognized?

A11 There is such a broad range and the kinds of the things that I got involved. I know we are talking today is web based and web base is one of the tools. So when I was involved there would be all of those components with either web-based or web delivered components be part of it. If I go back and look at something that was strictly just web, I can go back to some of the work in MM which was the competencies training. That particular project there received the Chairman Reward. It was a web-based delivered on competencies, it was on global launch tools and they were on the extremely tight timeframe and we needed to develop a web-based training material to support that. And basically the net result was the content was prepared in three weeks, delivered, out the door, done. It was a success and the ultimate result was receiving the Chairman Reward for that work. There's a lot of different aspects of that, they were fundamentally different approach to how the training was created and I referred to it a direct development kind of approach. And that can be done when you have a foundational structure to work with, within the fixed technology like we were doing. It involved the direct access, direct input by the SMEs, and yet bypasses a lot iterative type of stuff. It is not rapid prototyping, I don't do rapid prototyping. To me iterative

process is a hard sale in an organization, you want to be able to do things, build a foundation and move on and deliver, and have the right input at the right time in the process, knowing that the shelf life is relative short and the content needs to be on target and needs to fulfill everybody's needs and address the specific training needs as well. So in a direct development process, we utilized tools, we developed our shell, A and I worked through utilizing common tools that our SMEs could participate in, and without going through additional steps we could directly generate web-based learning content from the source materials. So that particular one involved lot of things - It involved rethinking how content is developed and yet working with existing framework of technology and the people in the organization and such. So that one was amazingly in a lot of ways in that regard. Yeah, you don't get a lot of time but you got a very specific window of time for to be done in. You can't have 12 months processes, you know that's not the web world, and you need to have approaches that can involve social media type attitudes and approaches that content is not one person, and it's not developed through processes, it's developed through collaboration , and delivered to meet the specific goals and it's done in a format and can be modified and changed and maintained, so there is a sustainability aspect to it as well. So for one type of the course, that is huge. I'm throwing this out as well, this one was more blended, you know that one was a pure web based. A project that I went through very early on at my current job as I came on board with them. It was a very difficult time, I got involved in a separation training. Separation training is training for management on how they talk to employees who were being let go. Yes, it's tough, absolutely tough and the company chose to do the tough thing. The other company said, "Oh, whoever wants to go can go". Our company said, "No, we are willing to take a deliberate approach for that. And we are going to design an organization going through the tough times, so when we came out the other side, we have an intact organization ready to go." So in that process, there is a deliberate selection of people who were to be notified and let go and they could be there for 20 years and that they would be let go. So we are talking about a very horrendous, a very difficult type of thing to do, and all of that is all the things that going on needed to be addressed. In this particular case, I as an instructional designer was on the team of about 12 people. And as we sat in that room, around room that's it's kind of like this, none of us knew if we were going to be the target. So we are building a training for separation and anyone in the room could be gone in the next week, you know it was that kind of thing. What's so amazing about this project, there was a focus, understandably on the content of what needed to be done but when you take a look at something like ADDIE model, if you could imagine a roomful of people where that person was handling the analysis, that person was handling the development, which in that case would be me, another person handling the rollouts the communication piece of the implementation. So you had individuals that representing each of these components of the ADDIE model simultaneously, which is a wonderful illustration of how the ADDIE model is not a process, and the ADDIE model is an area of concerns area of

components that need to be addressed and accounted for, but it's not a process. While we were talking about the design, we were talking about implementation because they have to go hand in hand. There were components of it that were web-based, and there were electronic components, and there were podcasts that were done, and it involved everything that are at our disposal from the communication standpoint, to deliver and support management in this whole process and to provide the tools. We were dealing with the change curves in organization development, we were dealing with management directions and strategies, and all of this came in together and we systematically went through this whole process together as a group. And it wasn't like the instructional designer was the person, we were…I was one of the other people on the team. Each of us contributing, each of us having absolutely key role, but there wasn't necessarily one of us going in and making a final decision on anything. So again, highly collaborative, an amazing process, highly efficient. Again going back to this direct development type of approach, we couldn't go back, everything was very much time specific. As we went through the different elements of the change process, OD people looked at how we took the organization through change, and we were through it. Now, again there was a number of web based components to it, all of it had to do with instructional design from the communication theory, to change, to media, the tools, the right tool, the right place, the right time…all of that had to come to… so a totally different kind of approaches. But from the very beginning it was blended, because we looked at our toolkit, and what all of our tools had to communicate and support management activity. So it was performance support, we gave them the scripts, and the PowerPoint presentations to present where we were at in this whole process , and the enabling and empowering management at all levels to be a part of the team communicating the change to take place. It was born out of the time, that was the situation and it was the best of working situation I have ever seen. It was amazing. Well you were talking about web-based, I gave you one that is strictly web-based. This one deals with the whole blended the scenario of how … You come together around the specific purpose and objectives with results needed to be achieved and you had there very skilled people - Almost everyone around the table had a doctorate. So we were talking about highly educated highly professional group that came together. Quite often in instructional technology, we take a very self-centered view of how things get done. For instance , Cennamo model of layers of negotiation, has the instructional designer running around touching all these bases, well, that's one way to look at it, but if you look at it from the team perspective, the person doing the researching won't cognize the model, because I am over there doing my stuff, you know and it is important and it has to be accounted for. And I was working at the capacity of a developer, and working through that perspective of it, another person working through from management messaging standpoint, each one of the group would see their particular area as very important. And if you would step back and look at that whole process from those different perspectives, you are going to get a

different model, as opposed to strictly like this Cennamo model of layers of negotiation. You would see each of these component, analysis, development, and we had one person strictly from corporate communications, okay, communications, implementation, that whole messaging piece was going alongside of it where it is supposed happening. So it does give you a whole different way of thinking in terms of how an instructional designer works with aim and organization. The other piece of this that you get into is you know the start and the end points. If you think ADDIE as a process with a start with a beginning, there was no start there was no beginning, we already had research data represented over here. I'm not going back and doing research or second guess them on what the research meant. So you pick up and it's like you're taking all of these different energies, all of these different work streams and then wrapped them around into a single focus now, and that single focus, the outcome is going to be learning, training and communications… all of this is going to take place. So all of this is happening, it's matter of focusing and providing direction. And by the way, once that series of communications ended, these people go away? No, they are still doing their research, they are still doing their corporate communications and they are still …but now they are doing something else, for the time being we all came together as a team for a single outcome and that's a model we see more, at least I see more in the corporation, in a large organization where you have groups of people come together for focus time to deliver on a particular objective and they are going off to do something else or for short time they have other jobs too. So it's different kind of model. It's a different way of thinking about how things get done, and it is not an instructional design eccentric view. But it is the corporate and organizational point of view, understanding there's multiple perspectives involved and it's only on that understanding of that centric objectives the purpose that we are trying to achieve that this group is formed for the time being. So, that's how the group formed, the outcome becomes a very wide range of things, some of which were web-based. I would have to say the second one is the richest because it was broader, the other one was strictly a time challenge. That was all said and done in three weeks. But this other one because of the scope and richness, in really understanding multiple perspective in a project and working with the team, highly educated professional team through it, I know instructional designers to not always get that opportunity. And yet in the same time I would have to say in any organizations, there are good people and there is that understanding and developing respects for the team, mutual respect, not just respect for the instructional designer, but as an instructional designer for the knowledge and background and skills of different team member brings. You are not here to fix all that, change all that. But you're here to leverage that, to pull together, to focus for the time being, to achieve the goals thereafter.

Q11a How many team members in the project?

A11 About 12 people, that's kind of the estimation. It was a fixed group. The people in that room represented a very specific aspect of the business. There was no fluff, because this security and the tightness of the topic, it wasn't open

for just anybody to come in, if you didn't have the reason to be there, you won't be there. So yeah it's very sensitive topic. It was very self-limiting and a qualifying.

Q11b How long did it last?

A11b. We were involved in that process probably over a 12 week period.

Q11c What was the project about, was it about how to complete a step, process, use systems, or how to perform physical jobs, or change attitude/value?

A11c It is this idea of working as a team, so there is that whole team aspect, understanding what the team is, and that team, a real team is not a committee, a real team is made of people who are experts in their own fields in their own area, using the analogy of football team - you have a quarterback you have a central you have attack. These are very specific jobs, people are there to do a very specific job, and as whole you form a team to achieve the goal. So understanding a team in that regard, in developing some of the take-away, you are talking about learning, some of the take-away is not quantity in the team that makes any good, it's about to have those specific skill sets represented in the team, and the personal responsibility of those individuals have to deliver the best they can on that particular feature or aspect. If you have a graphic artist on the team, they are there to bring in the best skill in illustration to design those elements. And you have a SME on the team, that person is there to provide the current validated data information. If for a team to work optimally, these people need be delivering on each of those. So understanding a team on that regard and then like I said there is mutual respect for the team to deliver. We had that in the other web based program, we had unique people there, each doing their own thing and as a team deliver the project on time. The difficulty comes if the instructional designer oversteps their ability and skills, or there is not enough respect or the SME does not deliver on time. Then the team breaks down. So, going back what it is, it is a set of skill, it is a framework, it is approach, and it's principle based not process based, it is a set of principles.

Q11di Describe the project in a very high level (the process by stages)

A11di Okay, processes have beginning, I have never started in the beginning, okay, it is always midstream. Within an organization, they've done the needs analysis in the past, they've done the stuff before, they do their survey, they do all of this. And if you look at it from what I do first, in that sense, I look at it, "Well, what do we know? I want to know what we've already known before I ask any questions." So you take a scan or survey of the landscape, and I use a concept map. On the concept map, there is something tangible that can be referenced throughout this program. So I lay that out. Again that's really a kind of information gathering, conceptualizing type of… So the analysis is ongoing. We have history, you know, they do engagement surveys once a year. So we can look at data overtime. Right now, I go in, its' like, okay, we need to do something in this area. Management says, "Oh we need some of this", and you go in, "Okay, that's an indicator, this is something we may look at it, work at", and now I'm coming together and look at it what we know about this, what are the matrix, what are information that could be available.

Looking at the team who needs to be involved who are the stakeholders. So you are going to look at it from that perspective as well. The other aspect of this is, again, there's tendency for instructional designers to the instructional designer centric, it is all about us. When I was part of the team, I was then let in on what was going on before, I didn't put the team together, that team was formed by my management. So even that aspect of it, you come in and be able to understand the whole mix of it. And understanding my part my role this time. Another time, it could be different. It could be more expanded. Here we had another people who ran the different expertise. Another time it might be four of us. We are going to wear from different kinds of hats. So when you talk about process, I can go back and say, "This is how that project was done", and the hind sight says, "Oh, this was the process you went through". On the other hand looking forward, I could not have laid out that process, I could tell you the principles by which we were going to operate. And the principles then helped us define next steps and things to move to do. But as this thing rolled out, we were constantly checking and double checking and going through it. So to me process is something you do in a hind sight. So processes are fine, to talk about what you did, fine for case studies, that kind of thing. But as you work, you have to have the freedom to be able to be productive in your thinking, to be open to your approaches.

Q11dii Describe the project in as much low level (steps, tasks) as possible

A11dii Again, thinking through the different components, from the analysis standpoint, the survey work had been done in the past. And the research was both an internal knowledge but also the research was done across the board in other organizations who had gone through similar kinds of circumstances of what was done what happened. So, the analysis was both internal analysis but also external analysis of other resources of OD change processes and case studies and thing were brought to bear. So that was that pieces coming from the analysis standpoint. From the design standpoint, some of the things I was most directly involved was development of PowerPoint materials, development of web based training. We developed specifically one podcast, role play scenarios so we can demonstrate the expected behaviors of management. Again, this is absolutely horrendous, the videos we had to produce was as gut wrenching as you can get. It was very tough to film, it was very tough to edit it, because we role played somebody who had their career ended after almost 20 years. So the development elements…again that I was specifically involved in was podcast, PowerPoint, manuals and the job aids for the separation process. The design component again working from the expertise, other case studies and materials were done, we adopted a change curve model to work through, so went through the denial and that whole kind of process though final acceptance, all of that, as an model, then developed a series of communications based on where we anticipated the main body of the employees to be at any given time. And with the full acknowledgment that this is a model, do not confuse it with the reality that any individual could be any place on this line. But as the overall understanding, a way to step back into… allow management to take a more strategic view, and to give them

some tools to work with. The last thing you want them to go in is to say, "You are on your own". It had to be a support all of that, in the design of that materials utilizing models, looking at the cadence, because we knew when this event would take place, we knew when the announcement was going to happen, we knew when this group was going when that group was going. By going I mean the task was going to fulfill. By the way task is a euphemism for the whole process. So we had from the design standpoint, the cadence that came from management. Here's when these things were going to happen. And working with communications and understanding in getting those materials ready, signed off, reviewed and ready to go, because it was absolutely this is when this is happening. So from the design stand point, understanding the timeline, understanding the messaging that needed to take place, and having the tools ready. From the development standpoint, doing the video shoots, getting the editing done, all of that. The implementation, understanding the formats, we had a global audience. We haven't touched on that very much yet, but web is global, period. Web is not regional. So web and global are synonymous. And if you've got a global issue, it's a web issue. So we were working through things like global English, that was not just happening in UFO, that was a major focus for us, that were tasks happening all over the world. And understanding how all of this have been communicated. We had those aspects as well. But I have gone off target, bring me back on target with your question. The implementations… again that cadence, that timeline was driving the development and driving the design, because we knew we had the six incremental times that we could go out, "Okay, what's the messaging we are going to design for each of those installments, as we go out with part of the story, and part of the story, building that communication over the time, the implementation was absolutely woven into the development and design. Because of that, the cadence and the timing and other events would be taking place, and so on and so forth. Then as the research that monitored attitudes of what's going on in the company, there was also a constant input. As we… okay we did this installment, how did it go? How did it happen? Did people get matured? Was there any issues? So between installments, we were able to adapt, modify, clarify and go on to the next installment, yeah, the next task. So we were able to work through again in a parallel structure over a very specific amount of a time with the very specific targets and objectives we had to achieve. And ultimately the metrics were evolved in keeping our workforce engaged. We still had to keep focused because we still had to get to work done even though the cube next to you is missing is empty. As with the evaluation, again, as we started from the analysis standpoint, we had global surveys that were monitored, the engagement surveys. Those were the metrics that we tracked as we moved along. And very much interested in the attitudes from the people about the company, and in the future of the company, did people believe where the company is going. It's hard to measure the duration of the training, because it is both communications and the training. But here were the pieces: There were e-mails, the official e-mails, announcements to management, dealing with just the training aspect of it,

there was a SharePoint website to go to for resources, so you had your job aids, forms and the scripts that you were literally encourage to read because of legal implications. For example, there was an instructions of not to say, "I am sorry", it's admitting some kind of culpability here that I have done something here. So there was very specific way of dealing with languages. So there were scripts that were prepared, the verbalized walk-through of the manuals. I produced that podcast role plays. So there was webcast, there was web-based resources… those were the pieces and components over all there might have been two or three hours material that actually they would've gone through. And that there was different way of sign-up for it, like webcast for Q & A. The podcasts were delivered for role modeling, demonstrations of what this looks like, this is what it sounds like, we even got to what this feels like. It feels bad really bad. Um... the podcasts were delivered both synchronized and asynchronized. They were available in WebEx and they were also available for self review. Because of the absolute fixed cadence, this things were happening, there needed to be a lot of flexibility, a lot of opportunities for a supervisor who had that responsibility to get as much support as they felt they needed. And we wanted to make them to feel supported, there is material, they are ways through this, this is deliberate… Don't go and be apologetic, this is what's needed to happen. Let's just do it. Let's be respectful, let's keep it to minimum, but this is a task we have, this is a job we have to do. Understanding the separations weren't just for blue-collar, it was at every single level of management. And it was exactly the same process.

Q11diii What event/communication marked the beginning of the project?

A11diii At one point in which I got involved, but it did not started with me. Did it begin at some place? Yeah, the upper management decided that strategically we had to make adjustments. Okay, so it started there someplace, and as it came down, and the whole process was beginning to be understood by management, they understood the very key component of this, to support this process, then it became a learning aspect team to it. Do we need to go out to do learning assessment to determine if this is a learning problem? Well, we knew there was a learning component, but the scope of it we had to figure out, but it absolutely needed to be a learning aspect to it, that is the whole learning initiative taking place in management. So like I said when I came to the team, the decision was already made. There was no one person per se making a final decision, but there was a learning management lead in that process, who called the meetings, set things up, so there was a coordinator involved in it. But again at the level that we were working, we basically had to have a head state, we had this person responsibility for communications, this person responsible for… There was a lot authority within the room. Now it's not that they didn't have people to report to, they did, just as I did, but again the nature of the whole group was - we were doing things that we absolutely knew necessary we have to do, here is what we are going to do. And there was a reporting to upper management beyond that of here what's taking place. But throughout that whole process I never saw anything that we were doing

changed because of upper management someone else made a decision, which is amazing.

Q11div What event/communication indicated the completion of the project?

A11div There was no celebration. At one point, we did last communication, and we stopped meeting. The kind of event this was, the nature of it, it wasn't something we had to go back as a group. The content is still out there, but as we came through the event, the task, it was meant to be a one time event. It wasn't meant to go beyond this.

Q11dv What was your role in the project?

A11dv In this particular project, as instructional designer and media specialist really, I worked with different groups, in documenting and producing content. I did all the graphics for the change process. I did videoing, I did video editing. Again because of…within this very tight group, the less people involved the better, more efficient, but also with better control of communications and information as being delivered. So very tight from that standpoint. My role in that was working through the adaptation of the change curve, incorporating company terminology into it. And then working through assisting each of… you know, from the communication standpoint, from the technical standpoint as well, from the content standpoint, how this stuff measures, so there is continuity of all of those pieces that went out. So I was involved in continuity, I was involved in technical assistance, I was involved production, and again because of my background in graphics, I could profile that role as well. I did video-graphic, not photos. I was the one shooting videos, as well as directing, uh, scripting, it was a team effort, but yes I involved in the scripting aspect as well, turning dialogue into role-playing videos, and how does all this fit, how do you break it up. We identified the actors, the person playing the employee who was let go was actually from an outside consulting firm. And he did a very convincing job. So yeah we brought in an outside vendor assisting us in this whole change process. We had an outside vendor as well for consulting the separation, primarily they focused more on the next steps, providing counseling to employees who had been separated. In this particular project, no budget, because it was internal work we did because of the intensity and the focus of it. We did have outside vendors but I did not work with them, that was done at a higher level. Even within this group the vendor was chosen above that.

Q11dvi What software and services were used?

A11dvi We were using the existing platforms, in this case SharePoint which was already implemented within the organization. So from the server space all of that the materials were already available to us. Frankly, a lot of things we do now is leveraging the existing platforms. We are not going out, the company is not going to buy something just because ISD said, "We need to be doing this". The software we used… for the video production, at that time we were using Camtasia or Captivate, basically just streaming videos together. And now I use Premier for all the videos, which is a very solid, a pretty good tool. Basically we used Adobe Master suites, such as Soundbooth for audios, Photoshop for graphics. I had to bounce around between Fireworks, Freehand,

illustrator, Photoshop, After Effect, all of those things. All of those tools from development standpoint are fair games in a blended approach, all of those elements came together to create whatever message needs to be done. The design documents are typically done in Word, although that varies. And I use the term design documents very loose, the preliminary work, if you will, is where you are going into and set up, you know, here's where we are going. Sometimes is referred to as contracting, and contracting and design documents are very closely related, contracting being that very initial setup of your objectives, you got to sign-off from the stakeholders involved, that then kind of goes into the other design work and elements. I personally work in whatever the customer's working with at the time, sometime it's Excel sometimes it's PowerPoint, a lot of work was done in PowerPoint because it is the most ubiquitous tool that people use. You know you work with engineers it's going to be Excel. So it can vary. The most formalized piece of the whole process is not the design document but the contracting tool, the initial project, and that's more done at another side. In my area it's a lot looser than that, typically I find myself from tool standpoint, it's actually more Microsoft Word. Personally I spend more time directly at SharePoint. My deliverables were rolling deliverables, going back to that separation process, because of that cadence of weekly communications that went out as we prepare for that, the deliverables consisted of the communications, the link to support PowerPoint, and links to supporting podcasts, and other instructional materials to go along with it. So it was this cadence what was established and then the cascade materials where supervisors were then given materials not just for the communications to those being separated, but we spend a lot of time with the communications support the company supervisors to talk to those left behind. Because they still have work done and they needed to be understanding as well with those who were survivors if you will in the whole process. And that could be a lot of guilt, we understood this. So there was just the single event we were supporting in training but also the ongoing process training that went out incrementally. From the deliverables standpoint, there were incremental installments walking managers and employees through the whole change - how to stay focused, how to stay on tasks when everything is changing and shifting, so those were the deliverables.

Q11dvii What hardware and devices were used?

A11dvii From the hardware standpoint, yes, video cameras. Video editing, that's hardware and software. They was lighting, staging, studio, backdrops, pops, drapes, all of that, you had the camera equipment itself. Laptops as well for immediate digital storage. We captured 2AAs at that time to videotapes, we also captured to hard drive directly. Other hardware? Of course video projection. If you want to call web hardware, of course , a component of it is server. WebEx, you have microphones. You got conference calls so you got telephones. So a number of different kinds of hardware utilized to support that.

Q11e What were the outstanding features of this project?

A11e Um, one…I mean, from a contextual standpoint, the importance of the training is extremely high, higher than anything. I've done product launch tours introducing new car products, multi-million-dollar tours, those are pale. Those are kinda weak in comparison to the people's lives they were dealing with here. The cost of error, not getting those right, helping an organization through it. I'll just say the importance of a particular program, sets it apart uniquely from anything else I've ever been involved in. That made it unique. The focus of the group, the intensity of attention, and working through the level of skill that was represented in the room, is higher than anything I've ever experienced or worked with. The absoluteness of it. You know, we have the cadence, we have the timings of how this was to roll out, was to go, although other programs have had that. When you do live feedings and shows, you have absolute deadlines. You don't *not* show up for a show. You know, it happens. So I've been in…I've been used to those kinds of timetables before. And typically we do multi-million-dollar tour in three months, development time. I mean, that would be a common thing, with absolute deliverables and that issues go through it. But yet this was from a standpoint of a delivering and ongoing communication. It wasn't a matter of just delivering and that's it; it was delivering and hearing back and delivering and hearing back and delivering. So it's a conversation with our audience, although it's represented by different people in the room, it still was a conversation that we had in the learning process. So we were learning as well over the timeframe. So that was some unique feature as well. So looking back, if you can just set aside how bad the situation was, it was an absolutely exemplary way of doing training and communicating and thinking it through the whole communication process. So there are a lot of unique features to that, that I don't know is, when you take a company the size of YYYY, what was going on, what was happening, um, unless you look at MMM and HHHH, you know, where you are gonna see something, you'd have a whole different approaches to do it. So I think there is a uniqueness even in the scale of scope and the approach.

Q11f Did it occur to you that you wish to have done the project differently?

A11f We didn't have to do it. Haha. That would be the issue—that we didn't have to do it. There was a sobriety, a… We weren't making jokes in the room, it was a very severe time, um, and yet, there was professionalism throughout the whole process. So what would I change going back? Now, I would not have changed anything in that whole process. I've been getting into discussions with some people about, you know, YYYY chose to do deliberate separations as opposed to just handing out invitations, who wants to go, and, as hard as it was, it was extremely important for YYYY to do that, so that they were taking an active role in their future and not leaving it to chance. And managing through it, they weren't just taking whatever. So, um, no, in that particular case, I…it was tremendous learning, to see all this worked and it worked.

Q11g What were the solution(s) to the challenge(s)?

A11g Not applicable

Q12a What specific knowledge, concepts, and ideas that helped you?

A12a I've been addressing a lot of that along the way, and to go back to… Models are good to understand how things happened, how they took place, and hindsight. If hindsight was truly 20/20, then if gives your foresight. You know, if you look back and you look at what was the process, how did that process work, you can go back and look and understand. But if you take and impose a process rigidly, I'm saying rigidly imposing a process on a new situation, you're gonna run into trouble. So it's about the principles that you draw from what went on before. And you take those principles, and if those principles are solid, and ADDIE has tremendous solid principles involved, and it's not just instructional design. I don't care what industry you go to, they will have a form of the ADDIE model, because those components are universal. It's understood. Different names, different groups do it differently, they will add another this or that or whatever, but it still is exactly the same thing. And if you understand the principles, just like Merrill first principles, if you understand those principles and how those principles work, then you are free to create a process that's applicable and appropriate for the next project. So ultimately it's about the principles, not the process. Process is something you look back at and document, a principle is something that allows you to go beyond, to address a specific need. So that's a huge piece: principle-based design and development, OK. Um, another aspect of it is the experience base. You have to have a tool kit. Just having a list of principles doesn't get you there. If I hadn't already been able to do video-editing—as I've done video-editing in the past, it's been a long time with video—when the time came, I was ready to pull that tool out and apply it. When the time came to do a PowerPoint or whatever, I wasn't going off and learning it. I could apply it. I had that in my tool kit. When we started to talk about the change curve, I didn't have to start to learn that. I could pull that out, you know. So cognitive tools, skills, abilities, um, have to be readily available, you know, and become a factor. The old story, you know, if all you've got is a hammer, everything is a nail. You know, you are gonna hit it with this hammer. And web-based training kinda became that hammer for a while, because people got taught, here is how you do web-based training, so everything is web-based training, everything is a hammer. This was not about web-based training. Did we use web tools? Absolutely. Did we do video podcast and all those? Absolutely. Did we use email? Absolutely. We used all of those things. So that experience base needs to be broad enough to be able to accommodate using the right tool in the right way. So this is an experience base that was very much a part of how that program came together. Understanding the principles and having an experience base to apply were key components of that. The purpose and objective, having a very focused purpose and objective, that was the key for management. We all understood it. So you know, having principles and nowhere to go doesn't do it. Having all those wonderful things you can do—well, "I can do Flash," I can do this, I can do that—um, you have to have a purpose. So key component is, then, the strategic positioning or purpose and direction for that. Um, another key element of it is, even though my experience base was very broad, there was still people in the room that

hadn't…things that I've never been exposed to or worked with. People from the other D-side that had elements that they brought. So understanding both, having a lot to draw, to bring to the party, but also understanding and respecting what other people have. You know, and being able to leverage other people's intelligence, experiences, and knowledge is a key component as well.

Q12b What soft skills did you use?

A12b A huge soft skill that is needed in any kind of group work is ability to listen. As Al puts it, if you come into a situation like you know it all, you are at a great disadvantage. You have to approach things in a willingness to learn, willingness to grow. From an instructional designer's standpoint, a very key soft skill is the ability to keep learning. And that learning from all those in the room, your SMEs, your other people that are there, that openness is a huge soft skill in this. I quit and go to the people doing the analysis, saying "Oh no no," you know, "I've got to do the analysis," you know, that kind of flair. I mean, literally, this person had their doctorate too. It's like, "Okay," um. But regardless of who that may help, there still is understanding the instructional designer doesn't have a corner on any of this. There is this openness, this attitude of continually learning, continually leveraging those people around them. If all you bring is yourself, and all you walk away with is yourself, that's pretty small. But if you come in and you add to, you leverage and work with those broader skills, that's huge. So the idea of continual learning and listening is a huge skill that's needed in that. And we address this a little more formally: we talk about knowing your audience. We talk about audience analysis, but don't leave it just as the student. Think in terms of everybody on the team, and learning and understanding how you work with them, how you leverage it. So, from a soft skill standpoint, that's huge. Another soft skill is in the cognitive abilities. Just the logical thinking. To be able to organize, simplify, that whole cognitive process of gathering, seeing how the dots connected. Because we have a role of producing continuity, of pulling it together, of making a cohesive statement, out of all those pieces. So there is a tremendous soft skill if you will, of being able to think, and think about the content. Going back to… And those are all inter-related, because inherent in thinking is perception. And to be able to listen, perceive, you have to know where you are at, what baggage to bring, the mental models you have, you know, all of that stuff. In order to think clearly about that topic, you do have to understand yourself. So understanding, you're still growing, you're still learning, having that attitude and approach, cognitive skills around organization, and then there are skills around perception, to be able to perceive widely and clearly, more clearly, is absolute key. You go into this, into some of the ethnographic studies, you have to understand *self* before you can understand *else*. If you go into it and you haven't understood where you are coming from, how are you going to understand where they are coming from? And how do you differentiate between the two? So there is this soft skill of understanding self, and your own baggage and stuff and whatever that you bring to it. So there's *that* soft skill. Absolutely necessary. There is a soft

skill, if you will, of expression. You have to be able to express yourself to the group, If something is not good enough and I see it, I'm thinking about it, but I haven't been able to persuade you, I haven't been able to present or talk… So there's an absolute need for the soft skills to communicate. Some would group all that into one and say communication is two-way and we'll call it communication, and yet to really understand what's going on, there is this ability to express oneself, both ways, not only to receive and hear and understand, but also to express in a way that's meaningful—goes back to understanding your audience, what's the language of your audience, how do you communicate to them—and it can be literal and figurative. I mean, if I knew your native language, I could communicate to you better than we are now. But I don't so we can't. Um, so there is the ability to communicate. And frankly, this is totally on the side, if I was looking for an instructional designer in web-based training, I would look for a bilingual person, because they understand communication in a way that's richer, deeper, and fuller, and because we're working in a global community when we go on the web. We get caught up in thinking in terms of *here* and this is my audience, but a bilingual person would have that breath of knowledge and understanding that the world is a lot bigger than just who is sitting here in a room. So there is a lot of insight that a person brings, who is bilingual, along…I know you would be, but believe me, it's absolutely a key element. And that person can think in ways that I can't. OK, I study Spanish, but I'm not bilingual. But I know enough of what other languages are like to know that there is a richness there in a way that things are perceived, expressed, and talked about, that is broader than what I just had in English. So you know, if I was really putting through it, who would I hire, I would definitely look to someone in a bilingual stand, because they appreciate and understand things that are needed for global English. Even if we are talking about English, they would be much more in-tuned to those particular challenges and issues, because we truly do have global audience. I cannot, in that work that I do is web-based… I always have to be thinking about how it's translated, where does it go, how does it happen. It will be translated. It is. Web is not U.S., if not China. It is a global community. And we need global people developing for a global medium. So, you know, there is that, and that was just on the side. Could you put that in as a straight competency? I think it allows you to explore some ideas about what is a web developer, and as a web developer, what is involved in a global community. A web developer has to have a global way of thinking about things. It's a whole perspective. It's different. The whole way of approaching the medium. There is a sensitivity to it, that a person who's born speaking English, working in an English environment just doesn't appreciate. And that's a whole other funny thing regarding British and American English because we get into issues with that even among English. I work regularly with Australian, European English, and American English, and it's all…you know. The point was that the web is global. You need global mindset, global people to use the tool effectively, globally. Otherwise we alienate, we isolate different populations, because we're writing—again, part of this goes back to

understanding self, you know, that understanding particularly my perspective, my blind-spots. There are things that I don't see because of that, and it doesn't make my particular perspective wrong or right, it just recognizing that there can be differences there that I'm not aware of or sensitive to. When we get into culture and talking about culture, it's absolutely fascinating from a corporate standpoint. One of our vice-president talks about when they were hiring people and—I think it was in China, an Asian-Pacific area—they thought if they go out and hire local, you know, that would solve all the problems. And what they did was they went out and hired people who acted just like the people in our company. They found them, alright? They went out and found Asians that acted just like us. They failed miserably, because they weren't…within any cultural group, you have a whole range. It's not like a culture is *this*, a culture actually has a range and what you've identified is the median of that, and you can find within this range, you can find people just like me, and I can hire them and I did that, but they totally missed the whole major population within that and those people failed because they acted just like the people in our company. You can find the same people wherever you go in the world. You can find the same people. Now predominantly they can be different, but understand that. You can't say that the Asians are all this way, Westerns are all this way. We're not. They're not. So there is that whole aspect, but back to the point, web-development. At least the area I worked in, web means global. Synonymous. And thinking in terms of what skills sets are needed in a global medium is a key element. Any instructional design, really. Again, web-based designing is specifically global, but any of the communication that I do has a global audience. I would like to… There are soft skills involved… I'll use an analogy or example of Flash. We're talking about people learning about Flash, right? We learned this through MMM. And it's like you can take an instructional designer… There're 3 things you need to know to be skilled at to do Flash. You need to be a programmer, need to be a graphic artist, need to be an instructional designer. Those are three very different, very unique kinds of things. And I would always say, give me two of them and I'll teach the third. If you're a programmer and instructional designer, then ok we can help you get through the graphics end of it. And if you're an instructional designer and you know graphics, we can help you get through the programming piece of it. But if you are a programmer, trying to teach you graphics and instructional design, that's not gonna happen. So because the tools are so integrated now, the technology, the aesthetics that need to go along with it, as well as the good design, all three of those things have to happen together. So where do those people come from? Um, I came from it because I came through the graphics end, and I was fascinated with programming, programmed my first multi-screen, multi-image show in '81. I was working for an agency at the time and we had just gotten in some new equipment to do multi-image, multi-screen slide work, and I started learning programming on my own. Again it was like back in '81. Actually, it goes back further: I learned my first basic programming in '73. But I had this fascination with art and programming. I came back and got my Master's in instructional

design, I had… okay now we have the marriage of technology, aesthetics, and good instructional design. So you know, Cannon designer, not have graphics well, yeah? That's where again, you know your limitations, or you work with someone on your team who is highly skilled in that area and you work together, so you build a team based on that. If you don't have that skill, there are ways to make up for it or to fill that gap. Understanding that you have to have technology expertise, you have to design, the instructional design expertise, and you have to have the aesthetic expertise. And the aesthetics can be in music, I mean in every element from a multi-media standpoint that goes into it. Video, flow-editing, those kinds of things get into it as well. So you have three hats there. Does it have to exist within one person? Not necessarily, but you have to realize if you are not a graphic artist, don't use clip art. Get a graphic artist. Or if you don't know the technology, get someone who's in technology to build that team. And frankly the strongest team has each of those components in it. You've got someone to account for the aesthetics, the beauty of the whole piece of the process, the flow, the instructional design that has the fundamental foundation of the learning process that's established, and from technology standpoint, make all that work. Now, an instructional designer that has interests in multiple areas and wants to develop and go to meet that makes them stronger and stronger, always recognizing where their weakness is in, and where they can. To do really outstanding work, really should be a team. There is a strength in being able to communicate the elements in a team. If you don't have a team, get a white board. Draw it out, work out here, so you can get back and look at it. You know, storyboarding those things, you need to do that. But if you have a team, where you can go through that process of expressing your expertise in each one area, then you can build this off of that and put together a program that really takes advantage and goes beyond what you can do as an individual.

Q12c What hard skills did you use?

A12d Hard skills, technology, whatever that is, video, apps now, gotta know apps. The web now is apps. So what is that animal? We before used to have flat pages, you know. You publish through the web pages, bang. Now, what we are publishing is applications, apps, not too different from what we are doing with Flash. When we were working with Flash, we had all these things going on, well, think in terms of now, we've got all these web apps. We've got all these smart phones apps, right? That's what we're doing now. So from instructional design, you better understand the technologies to some extent, and do you have to become an expert in it? You better be fluent in it. And you then you buy or hire whatever the expertise is to get the work done.

Q12d What attitude did you realize that was helpful for the success of this project?

A12d You better be excited about it. Passionate. You better be excited about the opportunities. Again, it's looking forward to what hasn't been done yet, could be done, should be done, making a difference. That's absolutely key. Going into a project, you better feel like there is an opportunity to make a difference, and to be able to just have kind of the excitement about it. I just have a lot of fun with this stuff, you know. And trying to get people to see potential is a

huge challenge that I have, just day to day, outside of a specific project, is helping people to understand the opportunities we have now that we haven't had before, with information, and being able to help people do their jobs—that's a huge challenge. We haven't even touched on social media and informal learning. Basically…there is an irony within YYYY, of course, YYYY was way ahead of other companies in social media marketing standpoint. Introduction of the KKKK was all done through social media. Before any products in the country, before anything they had established in social media, in roads. And it was very successful. Internally, we're still trying to figure it out, IKEA is doing some work, presenting and making available platforms for social media, like Amer, is one internal one. It's still casual, there's nothing informal, but I use the term "casual" because it really is casual. It's not just informal, it's just like what's your favorite pad… (Microphone fell off) It's going to come back around to "What's the purpose". Again, you have all this ongoing activity. It's about understanding how to focus and harness activity in meaningful ways, to achieve instructional and learning objectives that we have. And that's a challenge going forward: how to harness all this activity. We're not make it happen, we're not gonna force it to happen, it's not gonna be legislated, gotta jump in, swim with them, and understand how to focus.

Q13 Which year was the project? What do you wish to have known that you didn't know back then?

A13 It would be 2008, 2009, something around there. The whole down turn, yeah. 2008. I want to know it all. Again, through that time, I was still going to school, you know, there is a lot of things that I've learned since then based on some studies in my cognitive psychology, specifically in that area understanding more of culture—what culture is, where culture exists, some of those insights now I can work back and see, you know, some things make more sense now, even, how things worked. But yeah, still learning. The concept of culture, shared knowledge, because we are talking about an organization going through change. And that shared understanding, trying to move people together, understanding that everybody moves independently, you can't assume everyone in anywhere is gonna change and yet at the same time, working with them, supporting, communicating… There was a lot of insights that I gained through those particular studies, which helped me understand more of what went on during that time. There's, anyways, you don't know it all. Back to the first point, you open to continual learning, knowing that you don't know it all yet. Even having gone through that, that whole process, the challenges now is how do we get back there, how do we create that again, how do you orchestrate that kind of focus without the problem, without the intensity, but to gather group together around a focus, to bring those expertise there. So yeah.

Q14 What are the other knowledge, skills or attitude which were not used in the above project but you used in other Web Based Instruction projects you led?

A14 I'm gonna go back to the same principles. Again, working through all of this, understanding what all the fundamental principles are that you're trying to

achieve. No matter what, context is still exactly the same. The project that was done at MMM with the direct development, at that time we were using Microsoft Word, we had SMEs directly participating in that content, we had a methodology that content didn't need to be produced and was produced. When we got out of the room, it was done. Or when we came back, we had more. It was just… Those fundamental principles, direct development of collaboration, of single focus, specific timelines, deadlines, you know, those kinds of fundamental aspects are consistent throughout every successful project I've seen. If you remove or don't pay attention to one of those principles, then project funders. It gets off-track, it gets out of focus, you don't get the attention, the SMEs disappear, you know. But if you can keep things tight time-wise, keep things tight from a outcome standpoint, the quality goes up, even though the time is shorter, quality is up, because quality is not just in rich media. Quality's also in on-target, time maintenance. At MMM we could get out anything on time. Whatever we were teaching was outdated before the course got done, that's why we could never get it out, because our timeline expanded out the shelf-life. They were broader than the shelf-life than the content we were working with, so there was not an understanding in management there on how to adapt timelines to fit shelf-life, This is a time limit, it has to be done now, so there is that kind of focus. So those are underlying principles really serve me well through each of those scenarios, so I carry that with me, even though technologies are different. Now, some of the technologies I still utilize, I use Excel transforms that I did before, that technology has carried over. Now I use it to SharePoint, to give me flexibility and interface that I want to design, but… Uh, so there's some of those things, but the fundamental principles that do not change regardless. It will work different, it will feel different, seem different, but it's still ADDIE-ADDIE. It's always good to have a purpose.

Q15 Assuming you are hiring a person as a beginning instructional designer in Web Based Instruction, what skills are you expecting?

A15 I've hired instructional designers. I've done that before. For web-based training I've hired instructional designers. And now go back to… From an attitude standpoint, I'm looking for people who are exciting, excited about learning, about doing new stuff, and there's so much opportunity in this field to do this stuff. And there has to be that excitement about it. So one of those things I look for from an attitude standpoint is that excitement about the field. They put the time in and they're still putting the time in, on learning, that kind of thing. From a skill set, going back to 2 and 3, I'd love to have all three, but I'll take 2 or 3. I'll take an instructional designer and artist, I'll take an instructional designer and who's comfortable with programming, like HTML and all that stuff. You know, they're familiar with technology. So instructional design and instructional tech and aesthetics. I would look for 2 or 3 or at least. If I want them to be in charge of an instructional design process, if that's what I'm having, I'm gonna put them in front of a client. Okay, if you're talking about a support person too, instructional designer. I would not take a new person and make them lead on a project, that's just…it's too risky, very risky,

but there is not that tool kit, that cognitive tool kit available for them. They have limited knowledge and practice on how things work, how things take place, so I would not make a new person a lead. As far as support person, then I would want someone who has studied instructional design, from an instructional designer standpoint, I would want someone who's in instructional design. Recognizing that on a team project, you might have a graphic artist, but I would not hire a graphic artist that's an instructional designer. I would hire a graphic artist that's a graphic artist. I would hire them for their expertise, that's what they do. Then hire a web developer as a web developer, I would hire them as them. But as an instructional designer, I would want at least an instructional designer to have a formal program in instructional design. So they know the language, they know the theory base, they have the background, so there is a reference point to which to talk about training, that language skill if you will. For beginner, I would take a 4-year degree, Bachelor's, if that was their area. Again, because they would've had the exposure to that, they would've had the interest, and demonstrated the desire to know more about that area, so I would have that. Or if they got a Master's in it. Whether or not if they would be a lead in instructional design is based on experience. Have they done it before, I would track their record and look at that. Because instructional design doesn't happen in a vacuum from a development standpoint, there is a technical and aesthetic side to this. As I said, I would like to see some demonstration of those two. If we're talking about instructional design for web-based, I would absolutely have to see some kinda of technology or familiarity with technology, they are comfortable with it. If they're fondling with PowerPoint, no. If they can't do that, or they don't know how to format a page in Word, no, you could be alright for developing classroom training, but if you're gonna be a web trainer, then I'm gonna absolutely have to see a technology aspect of that as well. And, there would have to be some demonstrated sensitivity to the aesthetics. Communicating with people in a stereo medium like the web, you need the tremendous sensitivity to the aesthetics to flow, the interaction part of it. So I would be looking for that kind of… If they were bringing portfolio, now moving to a senior type person, I would want to see a portfolio that they've done that demonstrates both the aesthetics, the people side of it, and the technology side of it as well. From beginner standpoint, the thing I have to watch for is we work a lot with competencies/confidence's. We tend to use ourselves as the model. And obviously, a confident person look just like me. Obviously, a graphic artist and a programmer and are getting their doctorate in instructional technologies, that's what you need. No, I don't wanna go that far. I don't wanna go in that direction, yet those things have all been useful for me in tremendous ways to allow me to participate in areas because of those skill sets. But when you do look at the web, the web has a technology component, it has the design component—which I'm talking about the logic structure, how information goes together, how it gets utilized—and the whole analysis piece of it, it has to be there. Ultimately the aesthetics of delivery, because it has to appeal, it has to be used. You go through this ability testing, all of this things

will come out. So the web does dry that. And the web has a way of amplifying that, you know. Because of the distance, the separation of alive human beings through most of the web stuff, most of the…some of the social media still is bridging a lot of that. You have to pay extra-special consideration for the aesthetics, for the interactive piece of it, for those elements, or else you could go. There's no one there to gain empathy with. You can't, you know, it's amazing when there's a teacher in front of the room, and the scores are higher. But if you put a time difference, even with the smile sheets, I forgot in the studies I've done now, but the evaluations go down the farther the distance is from the individual. So, you know, in a classroom, there's a relationship developed. So when you start evaluating, there's some of these things and with the web, you don't have that opportunity. These kinds of things, like the aesthetics, become hyper-critical in a web-based application.

Q16 Assuming you are hiring a person as an experienced instructional designer in Web Based Instruction, what skills are you expecting?

A16 Still have to be excited. They can't have done it all, because there's so much more yet to be done, so I'd be looking for that continuing learner, from an attitude standpoint. I said from a demonstrated skill set, that point, for the senior person, for the portfolio, the demonstration of those capabilities. I think kind of all that. No, the experienced one does not need a Ph.D., that's because I don't have one yet. Hopefully not. See, I said it wasn't just Master's, Bachelor's. Because there's a certain aspect about being able to language an instructional design, you have to know what terms are to talk about it, to be able to put together a design. For us to be able to talk professionally about the field, there needs to be that education. So from a beginner standpoint, they need to have that background. Yes, it's book knowledge, but it's a language now, it's understanding what it is. There will come greater knowledge or greater understanding of what that is, and again, if there is that attitude of okay, now I've got the structure, I've got the schema down, how does it all work, you know, how does it work in this case , what does it look like in that case, and you can build on that grow. But if you don't have that as the first criteria, where do you start? They have not shown any interest in the field yet. Where is the base even? So, either a Master or a bachelor, but some actual education in the field to know the language, to know the history, and to know what is about. Then going into experienced one, there has to be a demonstrated transition from head knowledge into application, demonstrated application of what's this, how it actually plays out in real life. And again, not put book knowledge and experience at odds. They are not. They build upon each other. They work together and one doesn't have superiority over the other. But there has to be understanding of how they do shed lights on each other. There needs to be that maturity. They have mutual respect. In order to lead, the lead is not something that can be mandated. Lead is earned. So from senior instructional designer, understand how to build those relationships, how to build mutual respect with the team. That is the first part of leadership. If you don't have that, you are not even leading because leading is about influencing. Inheriting of that, it is a high level knowledge about the field,

what is going on? Why you do thing? How you do things? There is a proper way. What the principles are? So, there is the knowledge of field. There is mutual respect. There is a skill set. Getting into communication is a piece of it, to be able to communicate and express fluently. Actually I would like to think I do speak a few languages. One that I speak is HTML, which is another language, like Excel and Access. I know how to communicate to those languages. There is technical knowledge that needs to be developed. We understand of it. Again, so to mature instructional designer, there has to be that technical development as well because they need the language that we speak. Instructional design, formal education gives us a language which we can communicate within community. It is community. Technical language gives us the way communicating with other people. There is need to development of expression to be able to communicate even the status of program. And ultimately, there is influence heard to be able to do that.

Q17 Which direction do you see Web Based Instruction is heading to?

A17 We have instructional designer need to understand about what social media is. Isn't it really different? Do we have series base already that pretty well support us? Or there is new series base we need to go. We need to understand more that kind of stuff. Taking into account of social media is not that so the other goes away. Needs to be continuously thought of as continue online. Originally Web 1.0 we have public based type of media. You publish web pages and put out there just like put out your print. Now you got people from all over who can get to access. We have to use access jump when things went HTML because you can put things out there and everybody can access to it. But it primary was a publishing. While we still do that. There are announcement that things that we put out there. This is the best way to get information out to publish. We still publish. We still do Web 1.0. That is fine. You know the Web 2.0, we got into this idea that, while I was publishing, you can publish too. We are both contributing and we got information out there. You know the Web 3.0, we get into social media where we have free flowing communication back and forth. Where is the content? How does the content exist? We got Wikipedia. We got all these things that content exists out there never existed anywhere else. So we are all publishing and we are all involved. Then we have this thing called apps. So we got apps that content is talking to content, not just people talking to people or people publishing. But now we've got smart apps, we've got things out there that are communicating with other apps and are bringing together information in ways that are unique to me. We need to understand about what apps are. Actually that would be Web 3.0, Web 4.0, believe it or not, people are talking about that. But we are getting in with the apps, we are getting into this thing called augmented reality. You don't realize it but you use it all the time. What you get with augmented reality is real-time apps interacting or giving you information. Goggles. You've ever heard of Goggles? That is an augmented reality tool. Apps can do that monitoring your learning and adopting themselves to you. Apps become context-aware. The number of input devices within this thing? It knows how you're holding it; it knows if you're shaking it; it knows this way, this way; it

knows where in the world you are; it knows a lot. There is a lot of information going into this device that apps have access to. So when you pick it up and standing in front of a building, going "What is that building? I think it's important," and you go into the Goggles and you go, "Oh, the building is this and, by the way, so and so lived here and blah blah blah". You're standing there, real time, and you've got reality. And you've got it augmented, you've got it supported. Or you're outside a restaurant, and you go, "I wonder what the menu is," and it comes up, here's the restaurant, here's the menu, here's…and you've never gone inside. You go into a museum, and you've got some apps here on that. Museum modern history, and you're standing in front of a picture. Well, here's all the information here, here's how it's painted, who did it. It's augmented reality. So the space, the classroom, the reality where learning takes place, apps start working on that. Now those apps are pretty much just single apps. But then when you get apps talking to apps, is when we get into a much more powerful network, and you start bringing together functionalities, not just information, but tools, performance-support tools and elements. Where you'll see the next iteration go, which is already started? Apps that control things outside. You use an app to control the temperature in your home while you're not home. You go on and you look at the babysitter camera from your app, you're not there, you're here. You initiate the cleaning cycle on your robot at home that starts running from your app. So the app is no longer confined to the device, the app is actually working in my world. The app is driving my car. YYYY products already park themselves. So the next iteration—and it's all blurred now—because these things are happening. You can go into Sharper Image, and you can buy a little robot that you can run on your phone from your app. Bluetooth, communication. When the app starts interacting in my world, that's taking the yet next step. So from instructional design standpoint, all of these start really blurring, and it's moving so fast, in understanding how to develop learning apps. I've been in conversations with Harvard and these other companies, and they're trying to understand learning apps. What is that? You know, I get in my car, and the car knows I'm there, and it syncs up, literally, Ford Sync. And the Bluetooth acknowledges me and, you know, I wanna call, I just say, "Call," and now what was something on a machine some place is interacting in my space. So we've gone from publishing to a collaborative space, to these automated helpers working in that collaborative space, to these apps that are now interacting in my space. So, from an instructional design web-based training, oh my.

Q18 What do you think an instructional designer should do in order to keep up with this direction?

A18 Well, it's all technology, and that's where… There is a people side, frankly, that never changes. People still—this is me speaking now—at the best I can tell, people still learn exactly the same way they did when I started studying. People have not changed. We haven't changed, our capacities haven't changed, cognitive load is cognitive load, it's still 7 +/- 2. I mean, all that is still absolutely true, it's not going to change very soon, if at all. If anything, we tend to be getting worse. Give that aspect of it, there's a certain side of

instructional technology that is solid. The more we understand about people, how they learn, how they interact, that's pretty solid stuff. That is *not* about technology. But there is the technology side of it as well, and that's constantly changing. So we can be grounded in certain principle-based things, like how we do instructional design, those principles are solid, those aren't changing just because a new widget came out. But a new widget came out, what do we do with that? There is a technology that we need to be aware of, and we have to participate in that world and understand it. So jump in. You just gotta participate, you gotta be part of it. Ask what's happening. And because of our…because we are not passively participating, we are looking at it, we are stepping back as instructional designers. We're constantly in it, but we're also stepping back and looking at what's going on. So you always have to have this strategic point of view. Even in any of the media we use. You know, you're in it, but you're also observing. This goes back to more the ethnographic type of approach. Training- or design-based development, you're in the middle of it, you're happening, but you also step back and you are also looking at how are the theories working, how is this happening, how can we improve it, what are we gonna do moving forwards. You have this dual role, and with this technology, it's very much involved. You're in it, you're participating, but you're also observing. At some points, you do have to buy the expertise: you don't know how to do it, something is happening, somebody is ahead of you, you bring on that expertise, you find it. In some cases, you develop yourself, and that's fun too. When you can kinda see an opportunity that no one else has done yet, you get excited about it. There's an app that hasn't be written yet. And I'm gonna go write it. Or I'm gonna do this, I'm gonna make that connection that other people haven't made. And that's exciting. Again, if you are participating, if you're in it. But you can't be a techno-phobic. You gotta enjoy technology in order to participate in that part of the field. Some instructional designers don't care about technology and say it's the developer's work. That person is hurting themselves, because he's saying, I'm not gonna learn that. How dare an instructional designer say "I'm not gonna learn that"? It's like everything is fair game. Everything gives you a new insight, a new perspective. Now, do you have time or constraints, I understand that, you can't do everything. But to say and draw a line, say "Oh no, I'm not gonna learn that, I'm not gonna do that," then what they've done is they shut themselves down in that particular area, and they've limited themselves. So there has to be that openness to continue to learn, to recognize expertise, to respect expertise, but not "Oh well that's not what I do." It's like, oh no no no no. I would not have any patience for an instructional designer that said that. I wouldn't touch that person, because it's about learning. It's not about doing the same old thing. First of all, that person is gonna be caught short, because the technology is changing. And just like this area of social media, if all you're going to do is the classic course on web-based, you're gonna get left. People aren't gonna tolerate it. The audiences aren't gonna tolerate it. They've had too much exposure to the web, to the information being available,to being able to go out and decide what it is that I wanna learn,

and I wanna learn it. From whom I wanna learn it. This is what they have as an option. And if you're over here, saying "Oh no, that's technology, and I'm just gonna stay over here and do my thing" like they have options. And yours is lesser of an option. Could someone survive and get along doing that? Yeah, yeah. But to me, that is so fundamentally *not* what an instructional designer is. An instructional designer is about designing, they are about doing things that people haven't done before. An instructional designer is fundamentally a learner. Fundamentally an instructional designer is a learner. And if they ever stop learning, then they'll stop being effective one, because they're no longer realizing that this is the unique situation with a unique audience. Yes, it might be very similar too, but the minute you transpose that pre-assumption on the new situation, you've missed something. You are no longer effective as you could be. You have to be present, you have to be in the moment, you have to be with your audience, working through it. And it's a fascinating role to be in. I would say a person who's changed multiple jobs is more marketable than one who's stayed at the same position, absolutely, because they will have experiences, they will have more in their background of how things to even to pull from. Not that you would pick something up and just do it the way you did, but you realize the richness of experience and things that can be done….so many different ways, different people… The key is to keep…is to really understand what the fundamental objective is of the intervention, of what it is that you're trying to do. That's the value point. How you get there is going to be certain principles that need to be accounted for: principle analysis, principle design, has to be design—it doesn't just *happen*. It's gotta be developed. There is certain aspects around that. It's gonna be implemented, and there's gonna be some way to evaluate this thing. How have those things been accounted for: it could be an individual like in that project. I could point to people who represented each of those aspects. Call them a process, no. They weren't a process; they were people. With those responsibilities, and those were specific work steams that, for a period of time, were rallied around a particular goal objective. And in that case, the instructional designer had a leadership kind of role. And that is focusing, it's bringing together, it's rallying, it's all those kinds of things to make the outcome the best it can be, to leverage those skill sets that are in the room. If you can get that in one location, for instance, you work for an agency, you would have a broad experience. Like I work for an agency before I came onto MMM, and there I worked for furniture companies, I worked for pharmaceutical companies, I worked for manufacturing, I worked for a lot of different kinds of things. I dealt with sales training, sales certification, we did certification training for yacht sales, which you would be interested in. We were doing web-based training for an electronic company, but anyway. But our expertise is what we did. And we did performance support, understood the full blend that it's the right tool to right time, what…and the more of the different kinds of things you are exposed to, the more opportunity and depth you bring to the next project.

Q19 Anything else that was not covered in our conversation but you think is important?

A19 What haven't I covered…my perspective is that blended perspective, both academic and practitioner. At work, I get accused of being academic; at school I get accused of being a practitioner. And there's that constant challenge of both being true to the academics and true to the practice. And I firmly believe they do work together; they are not two ends of something. It's not the academics on one side and practitioner on the other. That doesn't do anybody any good. And I'm not being facetious at all. I'm being very literal that I have been accused of being academic at work and being practitioner at school.And I'm a proud practitioner and I am one bit of a scholar. I want both. And I want to be able to, in an application environment, to know I've got solid principle and practice behind what I'm doing, that I'm not making this up as I go—there's history here, there's a lot of good work, a lot of thinking, literally to stand on the shoulders of those ones before. So I want that. On the other hand, from a scholarly standpoint, there has to be the rigor of practice. To make it meaningful. If the knowledge can't be applied, then what good is it? There's baggage associated with that. Frankly part of the problem that I had is going through the academic side: if it doesn't make sense to me, it doesn't fit what I know in practice, it's difficult for me to study, to retain it, to re-quote it. It's like, why do I need to quote this person that I will never use? Because it doesn't fit, or it's outdated. You know, we know more, we know better now. I have a real time with Gardner, because the multiple intelligence was never proven out. They were never validated. So people want to talk about emotional intelligence and I go, what, what, what? I know what they say and I know how to use it, or they wanna talk about different kinds…they wanna talk about left brain, right brain. It's like, no, no! It's not. And yet there were lines of thought, there was scholarly worth, it was done along those lines at one point, but in practice, it's a gap repeated, it became something else misused, misapplied. And I want this scholarly piece of it to know where the real scholars are, where the real work has been done, and where it's just become corporate folklore. Things like brainstorming drive me crazy. "Brainstorming" is ill-founded, unsubstantiated in research, and yet it's the first step. "Oh we're gonna go and do some brainstorming." And here's the rules: We're gonna write everything, and there's no bad answers, it's like… you can even go to government websites that propose brainstorming and give you "that's how you do brainstorming". And the research does not support it. So there's a lot of folklore out there, and that's what drives me to the scholarly side, because you want to get through the folklore and all of that kind of stuff that's just being perpetuated, and get down to "this is how it really works". And ultimately, those are going to mash. How it really works in good scholarliness is gonna be the same. It's gonna be the same. And that spot, that weak spot that I wanna be in, those both validated, supported, understood, as well as very effective in practice. And yet anything less than both would be ludicrous. You know, if it's not both, then what are we doing? You know, because instructional designer is a practitioner. And yet we study it, academically. So

there is that, that challenge going back and forth. It's exciting still, as you know in the beginning, I'm 56, I've been in the business, I've been in the industry, I've been doing design work, I was there when performance standards were being written, I've actually developed two learning management systems, one for TTTT, one for a data-tracking company that was doing clinical studies. So I've developed learning management systems, they were the standards, they were being formed. I learned my aesthetics before computer science. So yeah, looking at all this, it all fits and it does have to fit. And it should, like I said. As our learning objects become interactive in our own space, like I said, these programmable robots now that are driven off of learning devices, cars that now are functioning on their own, and you know, these applications, these things that we are working with, we have to understand from an instructional design standpoint. Performance support. Ultimately a car that parks itself is a performance support tool. A robot sweeper that takes care of your house that you control is a performance support tool; it's actually doing some of the jobs for you, physically. And it's not…those things that I just mentioned are absolutely happening right now. So this isn't future kind of stuff. So an instructional designer going forward? Technology—better have an understanding of it. I've been members over the years in ASTD, ISPI, and…I don't know if I've been a member of AECT yet. ASTD and ISPI are more on the practitioner's side, while AECT is academic because it's about schools, yeah, it's about teaching in schools. It's a school focus as opposed to corporate. ISPI getting into performance—it's more about corporate arena. I went to one meeting about a month ago. That was AICT, local chapter, I have to do it on my own, purely on my own, my company didn't sponsor it. I guess that would make a difference too if my company sponsored it. But over the years I've been to things like the Macy learning decisions conferences, I've been to those, so I do participate in some in those. But as far as a faithful attender… Well, there is a need for socializing with other practitioners, other people. In the case of the last several years I've been going to Wayne State, so I've had that other contact. I've had ends. And where I work, I'm with other instructional designers as well. I carry that off. I talk to her usually several times a week, and we are doing things like need assessment, all this stuff. So I… And it's big enough and broad enough that I have contact with a lot of different kinds of people who are educated in a field. I work with a couple of doctors in instructional technology. So there is that professionalism and level independent of some of these organizations. So over the last few years, there hasn't been the need, so it's not about neglecting that contact. It's about being able to satisfy that kinds of relationships outside of the organizations. As I mentioned before, my area of studies specifically is in competencies, managing competencies. And specifically creative competencies, so somewhat related, so there has been a lot of thought around these areas. So when I talk about things like soft skills in the area of self-awareness and perception, these are the areas I've been very specifically interested in as that supports innovation and creativity and management. The topic is creative competency for management from a business standpoint.

What is it? It is *the* most important thing that people keep saying. "Companies have to innovate, innovate, innovate." It's like, okay, how do you do that? Well, we get things like brainstorming. It's like, no, no, no, no. There is so much urban folklore, just, you know, things that get passed along, and it's better than that. From my background, my understanding, I've taught art, I've taught drawing, I've taught some of these things. And I understand creativity from a more general standpoint. There are schools of thought out there that you have to be specialized. And there's the general school. I come from, you know, my background where I'm coming from is that creativity comes from a broad knowledge, as opposed to a narrow specific knowledge. And… but to be able to work through that, having the opportunity to at least dissertation and to explore creativity model that can be caught, supported, understood, managed, is where my work is. Who will be your population and subject? Get to be determined, it could be XYZ. Within YYYY management. Within YYYY, I got global population. So I can span many cultures, many groups, and deal with real situations. My original thought was, I might try design-based research approach, so I actually became part of a team in explore creativity applications and development. With Dr. G's direction, we might be looking instead at developing an assessment instrument assessing creative potential. And in that particular case, understanding creativity. What supports creativity? That's where, you know, my particular interest in things like bilingual, because it gives you different perspectives to draw on, that a person who's not been exposed to that would not have. This whole structure is ways of thinking about things you have that I don't have. It is… if you can define it, you can measure it, you know. And again, if you look at creativity potential, not creative production, and making a distinction between the actual producing of creativity and having the potential to be creative. Because what gets involved between creative potential and creative production is opportunity and motivation, and there's other a lot of wiggly things in there that don't necessarily correlate directly. But those that are creative would have these characteristics, these features. And it would be areas, and specific areas that I'm looking in, is I break down creative potential, break it down into three areas: one is the ability to perceive, the other is in the area of cognition, experience or background, and the third area is the area of expression. And a lot of the creativity studies focus on maybe the first two to be able to… they say a creative person is someone who sees things differently. So they're touching on some of that, you know, they have to be able to see first, but there also has to be a background, there has to be experience, there has to be things to draw upon. You can't connect dots when all you've got is one dot. You can have something to work with in order to see new connections, new possibilities. And the one that nobody talks about is the area of expression. Absolutely inherent to creativity is the ability to express. And when I look at expression, if I wanna measure creative potential, I look at how many languages do they speak, do they know music, can they draw, how can they express themselves. The more ways that you can express yourself, the more ways you have of seeing things and ways of organizing things. So expression

absolutely affects the ability to perceive and to understand, just like the ability to see affects how you can express. If you can't see a sunset, you can't express it. I mean, you know, if you can't hear a melody, you can't write a song. You know, it's… and if you don't know music theory, you can't write a score. You know, if you don't know how color works, if you don't understand the principles of perspective, you know, and if you…so there's a cognitive aspect, there is a knowledge aspect of creativity, there is a perception aspect, and there is an expressive aspect of it. Then when you look at all three of these, I can measure things about those and come up with a potential. This person has potential of being highly creative, you know. There are well-established, they are, you know, they can sing, whatever. This person has a high potential to creativity. And if I see that they do this and this but they don't do that, guess what? You know, if you went to school, maybe, you are able to see uniquely, you are able to see things that people aren't seeing, and you are really excited about it, but you are drawing lacks, the discipline, lacks of skills. You can teach, you can explain to them, you can… and this is what I did in teaching art and teaching drawing. I gave them a cognitive tool kit to draw from. Here's how you shade, you know, you can hatch, you can pointillism, smudge, you can watercolor...lots of different tools here. Now with that tool kit, I can see it, now I've got things, now I can express myself and I've become more skillful. So… Creativity can be trained. That is my premise, and I'm not the only one to hold that position. There are people that do too, but there are some people that think, "Well it's a gift." And here's the explanation, and I'll just make a general statement. Everybody can run. Some people can run faster. Virtually everybody can be taught to run faster. Some people just…they are structured, their physical makeup, they've got more muscle and whatever, they can run faster. And this person will never run as fast as the person does. But this person can run faster. And that point, you need physical ability as well. And frankly for an Einstein, there needs to be the physical capability, the mental capacity, but to tell someone, you know, "Well, you are not… you don't have the gift", it's like, what? No, no. Everybody can be healthy, you can exercise, you can do better than you are doing, and from an organizational standpoint, you want everybody performing at the next level, because they are seeing things that other people aren't seeing. They are exposed to customers that other people don't see. You want them thinking creatively. You want them thinking in terms of how can I contribute, how can I add, how can I express myself, because when you get the whole team engaged, now that's powerful. So that's the area. It's not about making everybody a world-class sprinter, but we all can run faster than the next guy. You know, we can do better than we are doing and have that optimism and approach. Then you take a look at creative production, you know, getting "Okay, we have all this". And if I don't understand what it takes to support creativity, if all I'm gonna do is look at motivation, and I haven't given them the tools, we haven't gotten into the training, we haven't set them up to be creative, you say ok we are just gonna come in here and do a creativity workshop, and you are gonna be creative. It's like, *r…right*. Okay, right, sure. Right. And that happens. That happens all the

time, with “oh, it’s just motivation.” You know, if we make an award system, you know, for new ideas, and we’ll give you, you know, five hundred bucks for a new idea we use, you know. Or they are working on the motivation. But they’ve done absolutely nothing to really enhance or develop creativity, or even understand what it is. They are treating it as just some kind of “Well, you are not motivated, which is why you are not creative.” Many many many many factors in it. So I’m always saying that the way it relays, because an instructional designer has to be creative. They have to be able to see, perceive, understand themselves. They have to bring with them a knowledge set to build upon, and they’ve got to ultimately be able to express that knowledge in ways that are accomplished, that people respect, that people appreciate. So it’s… I’ve been a creative director in two agencies. That’s the other part—I’ve been a creative director. I’ve had to do creativity. And people buy it, people pay for my creativity. So yeah. I’ve had that role. And instructional design. And now Dr. T has started seeing, you know, she’s looking at the work of Nigel Cross and design-based thinking. And it’s like, yeah. That’s exactly right. Instructional designers *are* designers. We’re creative.

Transcription of Interview 012

Q1	Good Afternoon, thanks for taking time with me. Can you tell me your current job title?
A1	Assistant professor
Q2	How long have you been working in the current position?
A2	1 and half years
Q3	What's your age range: 25-35, 36-45, 46-55, and 56 above?
A3	36-45
Q4	Would you say you are currently actively involved in instructional design?
A4	Yes
Q5	Are there any other positions have you held before, that were related with instructional design?
A5	Yes, I was a vice president at a company from March 2002 until July 2010, and I still consult with that company. And prior to that, I was an independent sales representative where I had to do on-site training and I was designing those training experiences, it was from 1998 to 2002. And then from 1994-1998, I was internal sales employee where I assisted sales representatives for their sales training.
Q6	How many years accumulatively do you estimate you have worked in design/development for WBI?
A6	For Web based, it is about ten years, from 2002 till this year.
Q7	In those WBI projects, how many years accumulatively do you estimate have served as a lead instruction designer/developer?
A7	Ten
Q8a	What's the major of your bachelor's degree?
A8a	Communications in Bachelor
Q8b	Did you have postgraduate education: Master's, or Ph.D.?
A8b	I had a Master's of Arts in Performance Improvement and Instructional Design from U of M Dearborn, and a Ph.D. in Instructional Design from Wayne State.
Q8c	Have you had any other training on instructional design?
A8c	Yeah, it was actually part of the master's program. It was a certificate program from ASTD in human performance improvement, and it was back in November 2003.
Q9	What's the business nature of your current organization: business/industry, education, government/military, health care, independent, other?
A9	Education
Q10	What's the estimated size of the organization you are working for?
A10	I am going to have to look that up. Let me look here. I have over 19,000 students, but that is not what you are looking for. There is a site that has this information. Yeah, I have seen this before, too. I just do not remember the name of the site. It has all this information about public universities.
Q11	Can you tell me a Web Based Instruction project you are very proud of or got highly recognized?

A11 It was a training program that educated internal employees at a major automotive manufacturer about one of the departments that existed within the organization that most people did not know about. The sponsor of the project was this specific department within the automaker who wanted the other departments to know what they did, and what the correct processes are to go about asking for their assistance in day-to-day activities. They hired my company as an external vender to do the work, but actually it was all internally based. They wanted to communicate what their department did to other departments within the company. It was a big company and there was a lot of confusion about what they actually did.

Q11a How many team members in the project?

A11a I would say five, if you include some of the people who did some part-time work. We had a project manager. We had two developers. I also did some development, but I was primarily responsible for instructional design, as well as being the main client contact. There were two primary SMEs and there were probably, I would say, three more specific SMEs who played smaller roles.

Q11b How long did it last?

A11b That's a good question. I would say it was probably three months. I took this project because it was a really interesting one. It was really challenging and unique. It was probably eight years ago. There were probably four modules, but it was designed so that there were different paths depending on what department the learner was in. At the beginning, they would select their department and the path would be customized for the information that they needed to know.

Q11c What was the project about, was it about how to complete a step, process, use systems, or how to perform physical jobs, or change attitude/value?

A11c It was the last and third. It was a process, but it was also about changing attitude and value. The primary organizational problem that existed was that these departments would come to this one department with requests that were not realistic, and it was because they did not understand really what that department did and the lead times necessary to do what they needed to do. They needed to change the perspective and the attitude of what other people came to them thinking, so that was a big part of it. But then, there was a lot of process content that had to do with how this department actually does their work so that these people could learn it, and then also what were the right steps to follow in order to make these requests in a realistic fashion so that this department could respond effectively. So that's why I think it's those two options.

Q11di Describe the project in a very high level (the process by stages)

A11di As from the project perspective of the stages, we basically start off with an information collecting stage, which is not specifically considered a needs analysis. It would be more of a content analysis. The unique thing about this project was that a large part of the design work had already been completed, but not all of it. The company that had done that work had gone out of business prior to the development stage starting. Overall, on the whole project

– if you take a step back and look at the whole project from the client's perspective, they were really in the transition from the design to development phase, if you look at just ADDIE. Whereas from our perspective coming into it, we still needed to do our front end work to understand the context of what was happening, who the learners were, so really kind of doing a short and quick needs assessment on our end so that we understood all this stuff. But then when we engaged with the client, they were already at that starting of the development phase, so that is really where it kicked in. We followed the five phases, really. We had analysis design development and then implementation.

Q11dii Describe the project in as much low level (steps, tasks) as possible

A11dii Well, the first thing that happened was we had an initial vendor meeting with the client. This was before actually getting the work, because we were not an approved vendor with the client at that stage. With a lot of these larger organizations they go through a process with whoever manages the training programs and their purchasing department to that vendor before giving them projects. We needed to meet with them to set all that up. So there was a formal process which would be setting that up, putting together the paperwork, answering specific financial questions and that kind of thing. There is also an informal process which is really more of a sit-down with the training managers at the company who oversee us and the job that we are doing, and they need to just be ensured that we can actually accomplish what we are seeing and what we are going to accomplish. So that was probably the very first meeting, was that in process to become an approved vendor. After that happened, we had a project kickoff meeting. We sat down with just the internal training team at this company. That did not include the SMEs. It only included the people who oversaw the design and development and implementation of the training program itself. They wanted to have us to be on the same page with them and understand the history of project, to understand the timeline of the project, to introduce us and explain to us who the SMEs were, though they were not present, but saying here is who these people are, explaining to us how the communication process would work. So what you asked before, was it acceptable to go directly to a SME with a question, or should we be going through the training department. They kind of level set that. It was actually okay to go directly to the SMEs. The way that it was pretty much defined in the kickoff meeting was that for all technical issues and technical questions and that side of the equation, we would be dealing directly with the training people. There was one training manager in particular who you would deal with. From a content perspective, you would be dealing with the SMEs. Of the five, there was one who was our primary contact, but there were four others that would be contacted, as well.

As a predecessor to all this, the SMEs had been involved with the design phase of this project, with the pre-existing company. They already had been involved and had worked on putting together the content and all that stuff. They were familiar with it. So when we came on as a new company, we did not have any of this previous knowledge or experience. That was a big challenge, determining exactly where we were at, what is the environment,

what is the context. That was a challenge in working with the SMEs because sometimes we would ask questions that they have already had and they had already gone over. So they were sometimes frustrated. They would not understand why we were asking these questions, when we had no idea what the answers were because we were not the previous company. So that was an interesting aspect of it. Then we would have, in terms of project management and communication, we would have weekly reports that we would submit to our training managers. As vendors, we would be required – I think it was on a Friday – we would report on basically a one-page word document sheet where we would report on the work we had done the week prior, what we were going to do the week following, and identify any issues and how we were going to go about solving those issues. It was a really clean and neat project report that we would submit weekly. Then we would go into development and we would develop modules. We would post the modules for review of the SMEs, and they had an alpha review process, a beta review process, and a launch. Actually prior to the launch, it was alpha, there was beta and part of the beta was a pilot where we actually had twenty to thirty internal employees who were the audience. They went into a specific pilot room and they took the course. So this was to ensure that the course ran correctly, that there were not any major technical issues and that kind of thing. So we did that prior to the course actually launching. Those were major stages of the project, as well. There is kind of a formal way to do the communication and coordination within the team and then an informal way to do it. The formal way would be internally, just our team as a vendor. We would have status meetings on Friday mornings. Those would be basically reviewing where we were at, what our big needs were, and kind of a report to the owner of the company and to the project managers, just kind of big picture stuff on where we were and what was going on. So that was the formal way. Quite honestly, that was maybe five percent of it. The other ninety-five percent was an informal way where we would be all in one spot. So there were no people who were offsite, we were all onsite. Throughout the course of the day, we would just be communicating on where we were at, where our needs were. I would have certain people working on certain aspects of the project and certain people doing other things on the project, and we could review the development of it real time from our server so that we could look and see where things were and where they were going. During that development phase, we actually had four people who were actively involved with developing. I would assign the work and coordination and track the progress. I would have a certain person do a certain thing or a certain group of things on different pages, or maybe try to figure out how to do a certain action that we could then incorporate on other pages. Then, we could review throughout the day where people were, or we could simply ask, "Have you got this page done yet? Are you on this yet?" So it was very informal. But since we were all onsite in different offices it can be very immediate and very real time to know where people were at, as opposed to, relying on an email or something like that where you have to write the email, you have to send the

email, and then you have to wait for some response about where somebody was at. It was very much real time which I think really, really helps in keeping a project that is on a short timeline moving. We did course evaluation before it was launched. That was that beta stage where we had the pilot. In YYY company, we did a level I, just to get their gut level reactions to the course overall. We also did a level II in terms of their knowledge assessment based on the course itself. So there was a post test built into the actual web course that was also directly aligned to the pass that they took. So depending on what department they were in it would have a specific pass, and we had to make sure that the test reflected the pass that they took, too. So we had the results from the post test as well as results from the pilot, in terms of the level one. In other words when we ran the pilot with those twenty to thirty employees, we had the results from the level one evaluation and we also had results from the level two evaluation, testing their immediate knowledge on whether they had the content down or not. So those were the ways that we did the evaluation. Once it was launched, as vendors we were no longer involved in any sort of evaluation. The training arm of the company took over at that point. As I recall, there were no major changes necessary in response to the evaluation information. If there were, we would have implemented changes. But the passing rates of the post tests were where they should be. The feedback from the level one evaluation was all positive, or at least to the extent where revisions were made where required to be made. If there were, we would have made them. I don't think they were required. I am also 100 percent certain of that. It was just awhile ago, but I am pretty darn sure of that. If there was anything that was required to be made, we would have done it. At that stage, I think we were pretty dialed in.

Q11diii What event/communication marked the beginning of the project?

A11diii (Answered in A11dii)

Q11div What event/communication indicated the completion of the project?

A11div This has to do with the maturity of the organization, the training organization, us – I don't think we had a formal post mortal meeting at the conclusion. We have done that with other projects. With this one, we did not. It was launched and it was live. What we did from a business perspective was schedule a meeting that allowed us to talk with them about potential future work. But it was not a formal post mortal in terms of the project itself. Because once it was launched, the company itself took ownership of everything. They basically had taken everything over by themselves. We were kind of out of the picture at that point. Because they already had their system setup, what we had to do was we had to come in as vendors and basically learn how their WBI worked and then utilize their structure. So they were not getting a "customized course" from us. We were learning their system and then designing it to fit their system.

Q11dv What was your role in the project?

A11dv I was the lead instructional designer. What that meant was I reviewed all of the existing instructional design documentation. So there were designed documents. I believe the design document was setup in a Word format. There

was also a proof of concept that had been structured in using – how was that course launched? Oh, it was in SABA. It was in a specific framework. We used SABA in order to build it with JavaScript. We had basically a starting template from the client and we used that template as a starting point to develop all the modules. My job was to basically understand the template, understand how the design document worked or the storyboards worked, and ensure that we were translating the storyboard correctly into the SABA template. So that is from the design perspective. Where I saw opportunities to improve the design or change things to make them a little bit more effective or efficient I would do that, where a lot of the work had to be communicating with the development team exactly what we were trying to do or how to go about it. So that is the design aspect. From a development aspect I was also developing the course with the developers. I would go through pages as my time allowed and work on certain things as that allowed. Then thirdly, I was the main client contact with the SMEs. I would go onsite and talk with them. I would also be the main contact with the training client, so I would go onsite and talk with him and also report to him on that weekly basis. Basically, I also played a role of a project manager at the project level as opposed to a higher level program manager, who we had.

Q11dvi What software and services were used?

A11dvi It was a SABA system. We developed – what did we use for development? I think we used Dreamweaver way back then. That was the only time we ever used Dreamweaver as a development tool. We used Dreamweaver with JavaScript to develop the course, and then it was loaded into a SABA system. There was Adobe Photoshop. I do not think we used any Flash for that project. I do not remember if we did. There was a little Flash piece, but we did not do it. There was Flash, you could say Flash. Flash was in there. No audio other than Microsoft Word and Excel. Those would be more from an administration perspective.

Q11dvii What hardware and devices were used?

A11dvii I do not think so. We did not use any video cameras or anything like that for this. This was all just web based. The content was all text based. We did not hire any outside person.

Q11e What were the outstanding features of this project?

A11e To me it is less about the actual training course itself and more about the relationship. Because of that situation being very challenging in regards to us stepping in midway on a project and filling the shoes of the previous vendor, it was very challenging. Having to navigate that and learn all the back history as quickly as possible, understand the storyboards, and get up to speed on the technology on a very short period of time was challenging. But we did it, so that was good. The training arm of the client was very happy with us because of that and also because of the way that we interacted with the SMEs. In other words, they basically had a problem. They had hired another vendor who did half the work and then went away. We came in as a solution to their problem, not from a training perspective or an instructional perspective, but from a business perspective. We did a very good job with that. To me the more

rewarding part of the project was that we did that in a business way, which is more than just like the technical aspects of the instructional design and development, but more of a relational kind of a thing. That to me was the biggest win from that project. It's the first project we ever did that had a SABA system – and the last as well. So we had to learn to integrate it with that. It also used AICC as opposed to SCORM which is a standard that is now completely outdated. We had to kind of learn to integrate the course using those standards and that language. Technically it was challenging, but we navigated that and we learned it and we did it well, so that was good, too. I would say it was probably those two things. From what I heard about the first vendor, they actually had a very good reputation. Their work was very good and professional. I do not really recall the specifics of what had happened, but they basically were a concession of consultants and for one reason or another they went out of business or they no longer worked together, or something like that. Basically, they just had to walk away midway through a project. So think about yourself. If you were on part of that training team with this company that hired that vendor, you kind of have egg on your face with your coworkers who wanted this course done, and you had to turn around and say, "Well, that company that we hired is no longer around," which is a big part of that whole vending process when you get to be a vendor. They want to make sure you are going to be around so that kind of thing does not happen. So that is why, to me, that was probably the biggest win was being able to help them out of that predicament by stepping into a challenging situation and doing a good job. That's how they hire us. And from their perspective, they were already out of the timeline. The project had its own timeline. We were just stepping to help get the project done, but the timeline was the timeline. So we were not part of the agreement process on what the timeline would be. But in that first meeting, if you recall, the first meeting I was telling you about, we were ass point blank, "This is our timeline, can you make it?" Before they hired us they wanted to make sure that we could buy into this timeline. As for the second challenge, you go to the Internet and you download whatever software you need. I did not look at that side of the equation as much. I was doing more of the page building and the instructional design and popup windows and that kind of stuff. We had our development manager who was looking at the technical aspects, like the AICC stuff and then the SABA stuff. We don't need to coordinate their learning code, only in as much as saying, "Here is the challenge. We need to know this, this, and this in order to make this work." So your number one priority is to figure out what we need to do in order to make it work. It would be less formal in a smaller company like we were. It is less formal and more informal, just to say, "We got to get this done now, so it should be your priority," rather than saying, "Okay, by next Tuesday we need to be here," which is a benefit of being in a small company.

Q11f Did it occur to you that you wish to have done the project differently?

A11f Here is the thing, and this is one of my great learning experiences from it, the only thing was it is really important to understand the needs of your clients and the perspectives of your clients. One of the things that happened when we

were in the alpha stage, which is the very first – like we are showing the clients and the SMEs the first pass of the actual live course – it had not been launched and it had not been piloted, they could see it – I had been working really hard. I had just finished an 82-hour work in order to get this alpha review ready. I was taking the day off. It was a Tuesday, so I had worked all weekend, I took the day off, and I was riding a bike and my cell phone rang. It was the main SME. I knew that the course was launched and that we had reviewed it until we were blue in the face and it was fine, so I did not know why he was calling. I did not know if it was a good thing, a bad thing, or what. I answered the phone and I talked to him. He said, "Well, I just need to say that I am really, really disappointed in this one part of the course. It is not at all what I thought it was going to be." I said, "Okay, let's review it. I am actually not at the office right now. Let me get back in and I will give you a call." What ended up happening was I had taken what the storyboards had said and build them into a course, so it was kind of a static situation where a page was, let's just say, a colored box with information on it. The next page was another colored box with information on it. Then the next page was another colored box with information on it, because that is specifically what the storyboard had said. When I talked with him about it and we went through it together he said, "No, this was supposed to be where you click here and this window comes up and they can click through this whole thing on one page." See the difference? So what had happened was with the previous company they had explained to him that that is how this was going to be. But in terms of what I could see in my information, I had no clue. From his perspective, I am just the developer, designer training guy, so I should know everything about what this was supposed to do. So he is not taking into consideration that I was not even around when they had designed this or what the conversation was. But that does not matter, because from his perspective that was my role. So I did not fully understand what his expectations were. So for me, one of my big takeaways from the project – and we fixed that and made it right. And it was not even that hard to make it the way he was talking about, but one of my big takeaways from the big project was in terms of the relationship as the consultant to the client is to put my best foot forward and put as much energy as possible into truly trying to understand what the expectations of my clients are and what their perspective is on the outcomes on what they want to see. So in this situation, I could honestly say that I was blameless. However, that did not matter because it is all about perspective. Now, I had to turn around really quickly and work a lot more again and get it the way he wanted so that they were happy with what it was. I had shared that whole scenario with the training client, the more technical client, to say, "Hey, this is what is going on." He totally understood because he could see the way that it was, and he said, "Okay, well, great. Good job for making it right." So that was a great takeaway just to focus as much as possible on the clients' expectations.

Q11g What were the solution(s) to the challenge(s)?

A11g (Answered above)

Q12a What specific knowledge, concepts, and ideas that helped you?

A12a I would say that just generally the ADDIE module gave us the foundation that we could follow. I think the most valuable aspect of that is it just clearly gives you a mental schema of where you are at and what you need to do in each stage of the project. So I would say we used that. From an instructional design perspective, I mean there are some rules of thumb. Again, we did not do the majority of the instructional design in the course, but not trying to have too much on one page, minimizing the interactivity so the interactivity is only there where interactivity itself lends to learning, having enough white space on the page, that kind of thing, basic message design principals. I guess that would probably be it.

Q12b What soft skills did you use?

A12b This is really where right now the focus of my research is on, this idea of what you are calling soft skills. That is what I would call the relational side or partnering skills with the client. I would say the number one thing is being able to have empathy with the client. It is not sympathy and it is not compassion, it is empathy which is technically meaning being able to put yourself into your client's perspective, so that you can really understand what your client's drivers are, what your client's needs are, what your client's expectations are. Once you can do that, you are in a better position to be able to meet or exceed those expectations, and to understand what those needs are. So really it is about a mindset of being able to fully understand your client's position on things. That is the big one. If you can do that, you will develop trust with your client, your client will have more faith that you are going to get done what you promised to get done. That is the biggest one to me. To me, that is the big one in terms of soft skills, is being able to empathize with your client's perspectives. Of course, in any communications you have to be professional. You have to carry yourself well. You have to dress appropriately to the standards of the organization. In other words if you want to wear a suit and tie, if you are a man, and the man of the organization does not wear suit and ties it is best not to wear a suit and tie. Because you are not melding with their culture, you are coming in as something different, either above it or just outside of it. But you really want to be as much of part of the team as possible. The way you dress is a big part of that. The way that you speak, the way that you write emails, professional communications is a huge and a very important part of all of this, especially when you are coming in as an external consultant. So there is that. I don't know, is there anything else? I think the one example of the conflict resolving that I gave you – well, here are two. One is that situation about the client's expectations about what that one process was supposed to be, in terms of the final project was different from what we had delivered in the first review, because we did not understand it correctly. So that was a big one. That had to do with client expectations. There was a second one, though, that had to do with when we were trying to look for more work after we were done – just to say, "Hey, if you have any other projects, we are available and we would be thrilled to keep working with you." Their concern was that we were too small and that we did not have the

resources to do the scale and scope of projects that they really required. So that became a challenge from a business perspective because now I had to try to encourage them that we were capable of doing what you needed us to do, and we scale up our company as needed based on the project. I would say those two were the obstacles to overcome.

Q12c What hard skills did you use?

A12c I did a lot of copy editing. I did a lot of copy writing. In fact now that you mention it, I'm remembering it. That was a large part of my instructional design was. It was going through and making the text more conversational and less formal, which was better for the course overall. So that was a large part of what I did. I also did programming. I worked in Dreamweaver. I used JavaScript, so I coded JavaScript onto pages where that was required. Animation was kind of done in JavaScript. Again, this was eight years ago, but you can do that kind of stuff in JavaScript as opposed to just Flash. We had Flash. In this course, we just did not use a lot of Flash. Video and audio were pre-existing. It was really just creating links to make the video elements work, or the audio elements work. We have a studio there and I have done all that stuff, but on this project, no. FTP, so posting stuff, uploading content for review into their system. That might be all I can think of.

Q12d What attitude did you realize that was helpful for the success of this project?

A12d I would say the biggest one was commitment, commitment to meeting expectations, commitment to the timeline. Like I said, I worked an 82-hour week in there. There were other people working 60- or 70-hour weeks. If we had not done that, we would not have gotten it done. We would have hit the timelines and we would not have met the expectations. So that is the biggest one, the commitment to the project and the commitment to the client in order to really meet the expectations. That was a big one. I think another one for me personally, and this cuts across all the projects that I work on. I really need to focus on how the work that I am doing is going to improve performance at a company or improve people's lives, maybe by not this course but maybe in other courses – there are a lot of them that this is true , by people understanding the content of the course and getting better at their job. They are setting themselves up to excel so they can have potentially raises, they can have promotions, that kind of thing. But if you as an instructional designer or as a developer or just as an performance improvement person you can make these connections in the projects that you do, then it helps in terms of your internal motivation to work hard on the projects and do what it takes to get them done in a quality fashion and an effective fashion. I would say that is maybe the big one. It is not seeing the forest through the trees. Because really as a technician, which is true, an instructional design technician. At that technician level you are so involved with the detail of the thing that is in front of you at the moment, it is hard to take a step back and look at the whole forest and see maybe how this is going to re-enforce some goal that makes the company better or gives an employee the opportunity to rise in their workplace, that kind of thing. Yeah, I agree. It is hard to see that.

Q13 Which year was the project? What do you wish to have known that you didn't know back then?

A13 I think it was 2003. I wish I knew more about the relationship with clients. I wish I knew more about that, and the overall understanding. This is what I have really looked at in the last three or four years. Now I am pretty knowledgeable about it. Back then it was really more off the cuff, and just thinking that if I worked hard and if they like me or whatever then that was enough. But understanding that there really are some core things that you can do within the relationship to make that client-consultant relationship stronger, which will allow you to be more effective and allow maybe better apt to get that long-term commitment which is if you recall was one of the challenges after we were done. They did not see the opportunity for a long-term commitment because they saw us as limited in our size to be able to deal with the stuff they needed. So that would probably be the big one. I do not think there were any technical skills or technical knowledge that would have made it all better. And that is my bias, of course, because that is what I really look at. I think it would be those relational things, how to most positively affect the relationship.

Q14 What are the other knowledge, skills or attitudes which were not used in the above project but you used in other WBI projects you led?

A14 I have done a lot of projects. That first project was much more of an instructional project. Many of the projects I have done are more performance projects where it is more important to understand how the organization works as a system and the different levels within that system and the different roles that people play within that system. So that type of performance improvement knowledge has been very important in order to work affectively in those different kinds of situations. Technically, looking at how to – I mean there are so many things, for example how to write learning objectives within a course that align to the overarching goals that the course was supposed to help meet. There is writing good test questions. That is important. There are other programs that you kind of alluded to, but yeah, there are all sorts of video editing and video recording programs from a technical point of view that you can use. There is Vegas. There is Camtasia. There is Adobe. I do not use Captivate, but there is like Lectora which I use. There is Flash, I think I have mentioned. There is Photoshop which is key for any kind of image manipulation. There is Sound booth for audio editing. There are tons and tons of all these different programs that allow you do audio visual stuff. There are also facilitation skills and delivery skills. I have done a lot of voiceover narrations, as well, for training. So having those kinds of skills, how to speak well, how to carry your voice well, but how to naturally and at ease. Those kinds of things are important. And then if you are actually going to instruct, there is a whole bevy of skills needed to be an affective instructor and affective facilitator. You need to understand the audience, just like constructional design but also face to face. How do you have credibility in the eyes of an audience, because if you do not have credibility you are going to be in big trouble. How do you carry yourself, how do you use hand gestures,

how do you control the pace of your speaking. There is a whole other skill set within that. To me, it just comes back to some basic things like being professional, professionalism is a big part of it. That is how you carry yourself, so this is attitude. Professionalism in the way that you act, the way that you dress, the way that you speak, the way that you write emails, that is a key component. Another thing with attitude –and I guess this is soft skills and ties back to before – but listening skills are absolutely vital. The one thing that you can completely turn off a client is not listening to what they are saying. These are skills that are developed. You have to work on becoming good at these things. They are not generally inherently turned on with you right out of the gates. You need to work on your concentration. You cannot listen to somebody well if you cannot concentrate well. Then there are techniques you can use with that. If you heard somebody say something, you can repeat, "So what I have heard you say is…" boom, boom, boom. By saying that you are letting your client know that you are actually listening to them and you are sending a signal that you are trying to internalize what they are saying. You are really just showing them that you are on the same page and you are trying. Those are important, too. That is a huge question. I could go in a million different directions.

Q15 Assuming you are hiring a person as a beginning instructional designer in Web Based Instruction, what skills are you expecting?

A15 Well first and foremost, they would have to have sound and instructional design skills. In other words, understanding how to align goals to objectives is a big one, how to communicate effectively with team members, that they would be able to understand the potential and limitations of WBI, because there is obviously both. For me, I would want them to be able to have very strong writing skills because that is not necessarily married to instructional design. I think that the best instructional designers bring that skill set. It would be nice if they had – and this really is not a skill – having had experience in working with WBI with clients who are very familiar to whatever project it would be. That is an important one. Being a team player which is so ambiguous, but that is a huge one. I think being able to take a systems perspective, that might have a lot to do with being a team player. So looking at a team from a system and understanding the roles that people play and why they play those roles. As for the degree, I would generally look for a master's degree. Let me look at the question here. No, I guess beginning instructional designers would not have a master's degree. I would expect them to be team players. I would expect them to have strong writing skills, and then that instructional design stuff that I said upfront.

Q16 Assuming you are hiring a person as an experienced instructional designer in Web Based Instruction, what skills are you expecting?

A16 What I mentioned above would apply to both. I think the more experience would be more autonomous. They would be able to do more things on their own, really kind of almost everything from a design perspective. Not necessarily from a development perspective, but from a design perspective, that they would be able to create the expected documentation that instructional

designers have to create, like design documents or content outlines or storyboards, those kinds of things, and a history of success in doing these kinds of projects. There are two things of leadership skills. One is being able to lead the instructional side of the project. That would include with client, with SMEs, all that kind of stuff, and being able to lead in a sense of being confident in your knowledge and skills and not being run over by a client, especially if it affects instructional integrity then a strong leader would step up and say, "We are not doing it that way because A, B, and C." I think that is an important part. I think also, though, it is being able to lead to in terms of the final – this is just the way that we have always done it and I have always done it – the instructional designer should be the lead of the final product, not necessarily the project, but the product. So because it is the instructional designer's vision and design that then goes into making this thing. So if you use a metaphor of architecture and building, the instructional designer is the architect, but the instructional designer should not just draw everything up, hand it over, and then walk away. The instructional designer should also be involved with reviewing things as they are going, with answering questions from the developer as it is being developed, and then also looking at the final product before it is launched. So product leadership, I think that is important. I would only hesitate because you do not want to take ownership of the development, because you have people who are developing. If you are an instructional designer, you might be able to develop that, too. But you need to allow developers to take ownership of their work. So you can take ownership of the product from a subtle level, maybe in terms of before it goes to the client you take ownership of it so that it raises its level in your own personal motivation to make it as good as possible. But you do not really want to be fighting over ownership of something on a team basis.

Q17 Which direction do you see Web Based Instruction is heading to?

A17 I am going to separate that out from non-instruction. Instruction means design. Non-instruction means people going to Google, people going to an electronic support system and doing their own thing. That is what I am not talking about. But when you talk about instruction, this means something that is designed. I think we are seeing more experimentation with virtual settings, so where you would have a simulation or you would have a virtual game type of a situation, and these types of environments make it less chronological in terms of the way the content is delivered. I think that is a big one. It also puts a lot more hones on the learner in terms of the direction and the drive and the control of their own learning processes. That does not mean that there is no design, though. It just means that it is less directive and more learner controlled. So that is one thing. It seems to me that as the technology improves and has improved, there is more utilization of virtual classrooms. So you have instructors who are going synchronized classes in a virtual setting where you have distributed learners across wherever the geographic distribution might occur, maybe globally. I think that has really grown quite a bit, but those are very much instructional because in those virtual classroom settings often times it is very structured. It is scripted. The interactions if there are any, which

there most likely would be, have to be built in advance. So that would be a second major movement towards the future. I guess really a big factor in all of this is the cost overall is lowering, which is a game changer. That allows the bigger companies to do more, but also smaller organizations to be able to do it at all, so that is a game changer, too. It is not so much just that this is where WBI is moving from now to the future, it is rather than people are getting into it in the first place who have not had the opportunity to get into it before. I guess in conjunction with it, there is a push towards the conversion of existing materials that are used for face-to-face instruction, which still over all half of all instruction is face to face. The WBI is growing but it is still less than half. But you are seeing the conversion of these hardcopy materials into electronic materials and then being placed into some sort of WBI. I think that conversion of the existing probes of materials from facilitative instruction into web based is going to be a huge thing as well. Online class is primarily put to the autonomy of the individual instructor, whether they want to do that or not. What we are trying to do is move towards programs that do that, but still by and large it is whether the individual instructor chooses to put forth work and effort to do that. Even for online classes, we still have designated instructors. Generally speaking, it would be more a synchronized, but there would be room for a synchronized discussion boards, that kind of thing. But there are virtual synchronized meetings, as well.

Q18 What do you think an instructional designer should do in order to keep up with this direction?

A18 Well, it is being more self motivated to keep up with this new information. Specifically, I guess being part of professional organization helps, the ISPI or ASTD. Because often times they have their fingers on new technology. They are always looking to add value to the members. Often times that stuff is low hanging fruit, so that is one way. Becoming certified either through ASTD or ISPI is a big thing. Part of the recertification process requires ongoing education, which need it be through university coursework of other ways. That is one way to require yourself to be motivated to keep up your certifications. So that is another thing. Attending conferences, but really it just comes down to wanting to continually get better at your job and stay abreast of the changes and where the field is going. It really just kind of depends on where the focus is at the moment. Still the greatest focus is teaching, so often times the readings have to do with the actual classes. So getting new materials that would be able to go in there or if there are revisions to textbooks, keeping up on that, that kind of a thing.

Q19 Anything else that was not covered in our conversation but you think is important?

A19 I don't know. It seems to me that the biggest challenge to instructional designers is that by and large because of the nature of the job, it tracks very detail-oriented people. Those are the ones who seem to excel. The challenge is that those are the same kind of people, huge generalization here, who are less adapt at those soft skills or focusing on the relationship side of things or being the best team players that they can be. Do you know what I am saying,

all those kind of nontechnical skills. I think that to me that is the biggest challenge within this field and this profession. Because the complete picture of a person as part of a design team or development team or training arm or whatever is being able to do that other stuff affectively as well. To me that is the number one challenge with a lot of these folks being able to be complete and whole a person as possible while focusing on those details things which is a necessary part of the job, but also being able to be sensitive and aware of some of the nontechnical things that can often times be just as important, if not more so. Maybe that would be my big last thought.

Transcription of Interview 013

Q1	Good Evening, thanks for taking time with me. Can you tell me your current job title?
A1	Yes, it is knowledge management leader
Q2	How long have you been working in the current position?
A2	Seven months till now
Q3	What's your age range: 25-35, 36-45, 46-55, and 56 above?
A3	I just made it, I am 36 to 45.
Q4	Would you say you are actively involved in instructional design?
A4	For the last seven month, my focus has been on knowledge management. Before that, my entire career was instructional design. I just recently made a career change. Well, I wouldn't say what I am doing is not instructional design, it is different. Our department has two groups, one is on training, another is on knowledge management. I feel as though we structure our knowledge management system as instructional design principles although some of my co-workers may not think that just because they do not have that level of experiences. But when we organize our processes and document our procedures, back in my mind I use my instructional design principles, maybe they don't, but I don't talk about because I don't want to scare them. But definitely I still use it, informally, use my instructional design skills for sure. So, the answer is still yes, and informally.
Q5	Are there any other positions have you held before, that were related with instructional design?
A5	yes, I spent my entire career as instructional designer and project leader about twelve years.
Q6	How many years accumulatively do you estimate you have worked in design/development for WBI?
A6	Web based, approximately for the last eight years.
Q7	In those WBI projects, how many years accumulatively do you estimate have served as a lead instruction designer/developer?
A7	Eight years
Q8a	What's the major of your bachelor's degree?
A8a	I have a bachelor degree in Human Resources from Oakland University and focus on instructional design,
Q8b	Did you have postgraduate education: Master's or Ph.D.?
A8b	Then I went immediately to my Master's degree in Oakland University and my focus and project was on electronic performance support systems.
Q8c	Have you had any other training on instructional design?
A8c	No, just informal online learning things like that, seminars along the way, just self learning, very informal. Throughout my career, I have had opportunities on some of the contracts I have been worked on, the companies sent to certain training and certifications in the past for the large companies I worked for. Yeah, just kind of smaller seminars. There was a certificate, from one of the companies I worked for, I forget the acronym now, you probably went through the same thing years ago, it was part of the pro trainer series, train the

trainers, one of them focused on development. It was so long, can't remember it was three days or one week training, there was a development part of it, and I focused on that, because at that time, development was very different from facilitation. Some of them did not have to worry about that, but you know we were on the development side.

Q9 What's the business nature of your current organization: business/industry, education, government/military, health care, independent, other?

A9 Currently, uh, automotive, so it is business/industry.

Q10 What's the estimated size of the organization you are working for?

A10 Globally, it's possibly 200,000 employees.

Q11 Can you tell me a Web Based Instruction project you are very proud of or got highly recognized?

A11 I developed a help system informal training for gas dispatchers at a gas company in the area. The goal was to get these gas dispatchers – they needed an informal tool because they couldn't be taken away for classroom training, so we needed a learning tool that they could use on demand whenever they needed it to provide them the information they need to do their job. So we sat down with all of the subject matter experts, documented the processes and put them in a tool, made that tool accessible off of their desktops so that they could access the information at any time, and the whole goal was just to improve the proficiency with these tasks that they had pre-defined. So that's kind of a high level.

Q11a How many team members in the project?

A11a There was three of us. There was a project manager, who's really just responsible for the timeline and the budget, and he was on the company side; he was an employee. And then there was myself and another person who took lead roles on various parts of the project, because we did a combination of – there are different types of learning. We documented the process then we did simulations and things like that, so along the way each one of us took a lead on a certain part of the project. Yes, this is really for in-house training. We were both designing and development, it really was, because I was thinking through that, and we really did team up on this and we could be considered co-project leaders because we were both responsible and – it was kind of nice because we were able to bounce ideas off of each other, but in the end it was up to both of us to make decisions and things like that. Again, one of us would take a lead on the – because once we did our task analysis, one of us would take a lead on creating the tasks via text, and then the other person would do the simulations, and we kind of switched. It was kind of nice because we didn't get bored, you know, because we were kind of switching jobs.

Q11b How long did it last?

A11b That lasted a year. We came down to 70 tasks that they had to accomplish. But with that said, those 70 tasks involved six different computer systems. So for example, when somebody called in with a gas leak, that would go to the gas dispatch system and they would have to do everything from determining the severity of it to assigning it to a person, then following it along, maybe assigning more people. So there were many tasks along the way. They had

large monitors with different software, so we had to incorporate a lot of different software into this, and that's why the only – we had to do simulations of this, of course, so that we could actually show what it's supposed to look like for the use, so the user could actually have our system, our help system, open and watch the simulations as they're doing it. So, it could be used for training, then again afterwards, it could be used for support reference tool as well. It was great.

Q11c What was the project about, was it about how to complete a step, process, use systems, or how to perform physical jobs, or change attitude/value?

A11c It is about process and using systems.

Q11di Describe the project in a very high level (the process by stages)

A11di The first thing we did is, at high level, we did a kick-off where we got to understand what the customers' needs were, were high level. After that, we found out – from that we found out who are audience was, who our stakeholders were, we found out the goal, you know, at a basic level from kind of a high-level perspective. And then the next thing we did was we went into the task analysis; that's where we determined it was approximately 70 common tasks all of the different individuals needed to know. All the dispatchers, they needed 70 tasks in common. From there, we quickly went into a design session, and we determined that a tell-show-do model would work best with us. We wanted to give them different ways, made sure we hit all of the different learning styles. So we did it with text, with simulations, and then a bit of a test. And then we implemented this system into their network, created a shortcut right off of their desktop. That was the implementation. And the assessment was great because supervisors would sit next to them, watch them use the system and make sure that it was useful for them. So, we walked away, knowing from a supervisor's perspective that they were happy; they saw the efficiency improvement with these employees, so that was very gratifying. That's at a high level.

Q11dii Describe the project in as much low level (steps, tasks) as possible

A11dii Again, with the kick-off meeting, we had some very specific questions. We wanted to know exactly what our demographic was, exactly who the audience, exactly what the goals were. And from there, again, we went into that analysis, and with that, we wanted to make sure we met with the supervisor to get their perspective. We met with the SMEs, the expert performers, so we would know how things are supposed to be done. And then, so the supervisors and SMEs/master performers, we determined exactly what tasks needed to be performed by all of the advisors. Not yet, there was nothing that was written. That was what was so strange to us, because – and that's what took so long, because we didn't have any material to go off of. It was what they call "tribal knowledge," you know, one person would sit next to an expert performer. But the problem was they would take away from that person's productivity because they would have to answer all their questions and everything like that. And then, that's kind of how they would learn, but then they would – because there was so much throughput, there was so much going on that they were finding this was such a great waste of time and they didn't have a lot of

dispatchers, and they were going to be bringing new people in and things like that, so that's where they decided that they needed a tool. And on the other side of it, they also wanted to 'commonize' everything; they wanted to make sure that the guys that were out there were all doing exactly the same thing right. Actually, yeah, by the end, we did know the process, which is, you know, so many training courses at the beginning of the year, and now by the end, you could almost do that job. So it was interesting, we had great SMEs and we sat down and we – so that we wouldn't waste too much time, they assigned us with four or five, I believe, and we would sit down with them. At first, we would document all the steps and then we would simulate it. We take them off-site; they had to pay them overtime so we had to be very efficient with that, and these were union members as well. Yeah, so that was a big lesson learned. So we would record the simulations, we went through and documented all 70 of those exactly. And that's what took so long, because we would do it, we would check with the different people to make sure we got it right, and then checked with the supervisor to make sure it was efficient according to them. So that's why it took so long – because thinking back I thought, "Wow, this was a long project," but then I realized all of the steps along the way and all the checks and balances we had to do to ensure that we were doing it the most efficient way, as well as the acceptable way by all parties involved. So, yeah, it was very interesting. So once we had everything recorded, once we had it documented and then recorded, we put it into RoboHelp software, and that's what helped us organize all of the content. And the great thing about RoboHelp is that it allows for searchability and things like that, so after people go through it one time, they can go through it again and maybe just search for a specific task that they want to perform. Again, the way that we organized it, first in text, and then we did it with a try-it simulation where the user could go in and we gave them support if they had a wrong click or whatever, we would show them the right way to do it, and then there would be kind of the assessment simulation where we took away the support and they had to do it the correct way. But that wasn't even the assessment; the true assessment was when they sat next to the supervisor, so they had a few different levels of practice before they were even assessed by their supervisors. Yeah, they would sit next to their supervisor, their supervisor would watch them, they would give them a task, they would say, "There's a gas leak in this location, what would you do now?" or "You need to send another person there, what would you do now?" So they would sit there and watch the dispatcher go through the process using our tool and make sure that the tool efficiently got them to where they needed to be. We gave them – they came up with the tasks. So the supervisor would give them a task and then the supervisor would just watch as they interacted with our system and with the true system, so with the help system and with the actual computer system, and they would make sure that everything they did was efficient and consistent with what was said in the help system. It was up to the supervisor, because they wanted to make sure – because we had said we could do an assessment with them because we use Captivate, and they said, "No, we

want to watch them." And it may have had something to do with their union agreement – that could be; I'm not sure about that. They were not allowed to give a grade or something, yeah, some unions – not a pass or fail or anything like that. So that's what we did. We, of course, piloted it—that was kind of a step that I missed—we piloted it with an audience to make sure that we got everything right, to make sure it was understandable for them. After the pilot, then we rolled it out. The great thing was is when we were done—I know that question will come later; I'm getting a little bit far—but it was exciting because we had to build this relationship. We were the youngest guys there. This is a very mature crowd; they all had 20-30 years experience at this company before they got involved in the dispatch. They were all on the line cruise and things like that in the field. So when we first showed up, they were kind of like, "Who are these young guys that are going to tell me what to do?" But then by the end, they threw us a party with cake and ice cream so it was so great. Yes, that's right; I know that question comes later on, but… The nice thing was we were able to use—and now that you're asking me that, it's making me think about that—we had… it was more of a straw model. We just went in and made sure that we had all of our tasks documented. It was somewhat of a rapid prototyping model, because I remember we went in, we gave them an idea of what it was going to be, and we kind of sketched it out, I believe, more like in PowerPoint. We kind of designed it that way to give them an idea, because I think it helps people visually when they can see it with a tool like that, so we showed them what we would do and then they agreed to that. So really, the design was probably more graphic, just showing them what it would look like and then showing them how the text and the simulations would work together to get this information across. And the design happened very quickly, because if I remember correctly when we began, he and I both had an idea of how this would work, so in our minds, we kind of – we already had a design in mind and it just kind of made sense. And then from there we knew that we're going to – because the company had used RoboHelp; of course, they had licensing for that. They used Captivate; they had licensing for that. And it just kind of seemed to work with what we wanted to accomplish. I remember that we set some rules for some of these tasks, as we're talking, it's making me remember. Because, of course, when we sat down with the SME, they said, "Okay, you need to do this and this and this," and before we knew it they had 30 steps, and we would say, "Wait a second, is that just one task?" They said, "Yeah, you go to this system and this system," and I said, "Well, wait. You're doing that and then this. Those are really two separate things, right?" They said, "Oh, yeah, I guess so." So that was a great way to help us chunk information, because we would put it down and – again, it would be so long, we would tell people, "Try to remember when you were new. Do you think you'd get lost somewhere in all of these steps?" And they'd say, "Oh, yeah, that makes sense." So, I remember many of those times where we would have, you know, we just let them go and we start documenting and they say, "Okay, now you go over here and then you go over here and then you go here," and we'd say, "Well, wait a second. Yeah,

this is very long and, you know, somebody's probably going to get lost. Can we think of a way to chunk these up more?" So, yeah, it could be both, design and task analysis, it really was prototype in design phase. And to be honest with you, that's… I found that – I truly like prototyping; it's the way that I work best because I'm very visual, and so I guess some of my customers have been forced to be visual. I like to make sure I get a scope documented to make sure that I have all of their needs documented. "Here's what we're going to do, here's our goal, here's our objective"—you don't need those objective words or whatever—but "here's our goal and here's all the things that are going to make that goal happen. Is that okay with you?" And then from that, sometimes I'll put an outline together, but a lot of times, it was some of the tools that I've used in the past. You can kind of go right in and begin structuring it, so then you can show your customer: "Is this what you're thinking?" When they see it, "Oh, yeah, okay, I see." And then, us, as instructional designers, we can use layman's terms, say, "Is this your goal for that? Are these the kind of goals that support that?" And then we can start asking the questions of how to fill things in. So I kind of like the rapid prototyping model in that I think it helps people visualize the end goal, as opposed to just kind of trying to talk them through it in an outline or something like that. So that's kind of how I work. With that one, we did not have audio; it was strictly text. The reason for that is they're on the phone, so they have headsets on and they have to be listening to the customers, so if we had audio it would interrupt with the customer's voice, or it would be – yeah, they constantly have headsets on. So everything needed to be just visual, yeah, in text, so we would – but in Captivate, we would have the balloons pop up, explaining everything. But, yeah, we couldn't use audio, because at any time, they could be communicating with somebody and that would interfere with that one. So, the simulation recorded what people were doing – so what we would do is we would record it in Captivate, so we would sit down, we would take them off the phones actually into a different building so they wouldn't be interacting with any of their peer. So we brought them to a different building and then we sat down with them and we would call up… I'm trying to remember… no, we recorded or we loaded Captivate onto one of their machines—because the company had a license—so we recorded in Captivate on there and they would go through and then we explained to them how Captivate works – you need to go really slow. But we actually did record their voice, but it was only for us, because we'd say, "Please talk out loud and think out loud," and they spoke very plain and slang and things like that, but we went in, we took that information and that's what we used for our callout and things like that. And the other thing we did is we said, "Please think out loud and please explain your steps," because that became some of our text as well. So we used that audio as the callouts, but then a lot of it is that's how we began to document the process that way. Yeah, it worked well; it worked very well. The hard part with that, I think, is getting people comfortable with thinking out loud, because a lot of times they're afraid that they're going to make a mistake. And that's one thing I found when recording people; it seems

like pretty much the first hour, it's just their anxiety and you're going to have to re-record that, so you just kind of let them practice like, "Here, just play with this," and then you show them what happens. They're like, "Wow, that's what I did." "That's okay. Now, this is for real. Now take your time in clicking, and please tell me what you're doing along the way." It worked out very well.

Q11diii What event/communication marked the beginning of the project?

A11diii I would say the kick-off meeting, where we established all the goals, the SMEs, the stakeholders and the audience that we're going to be working, too.

Q11div What event/communication indicated the completion of the project?

A11div Yeah, the party, it was so great. Because we loaded the system onto their network and we made a shortcut on all the dispatchers' work stations, so they could right there launch the system that way. And we were very surprised because we kind of thought back to the first day that we showed up and they were all kind of looking at us like, "Who are these young guys?" and a year later we had built all these relationships and then they're throwing us a party when we completed it. It was great. We didn't have to go back, unfortunately – I know that they had it; I think they've gotten it. This was in, I believe, '05 or 2006 when we did this. So I'm hoping that they went in and made updates, but as you know, sometimes, people, they lose budgets and things like that and some things can't get updated. So I only hope that – because once we completed it that was the last that we had heard of it and… I was with this company for a year after, and I know that at least for a year after they were using it, but after that I went to another company so I don't know what happened after that.

Q11dv What was your role in the project?

A11dv Well, it was… yeah, we were responsible for everything, and even making sure that we stayed within the budget, so we knew… but we knew that they were relatively flexible. The good thing was the customer, the project manager, knew how big this was going to be, so they said, "We know this is potentially a year-long project," so there really wasn't an issue with the budget. We just knew, okay… and we did a good job. We used Microsoft Project and documented every step along the way, gave ourselves plenty of time for… because, as you know, things happen and whatever. So it was truly a project, where from the very beginning we were responsible for organizing everything. And the interesting was a lot of time we had to work third shift, so we had to go in at 8:00 at night and work till, you know, morning. But we had to organize all of our meetings. We had to organize who we were going to sit down with, the simulations and things like that and then make sure, because at this time, part of the training department within this group has contractors even so we had to meet with them and give updates and things like that. It was a great experience. I don't remember there being any battles or anything like that, and I think it's because at that time, that was pretty new technology and that was a pretty new way of looking at learning, you know, this just-in-time training, performance improvement perhaps, and they were just so excited about it because they had nothing else. I mean, everything was new and they

were excited so we didn't have any battles to fight or anything like that. So, yeah, it was really our jobs to be kind of ambassadors, to make sure that they all knew that we're there to help them, you know. We're not there to outsource it, because I think that's the first they thought when we got there, was we're there to document everything and then outsource their jobs. And we said, "Oh, no, no, no. This is for you." So that was – a big battle was getting them comfortable with us. That's what we defined right up front, because we wanted to know who all the stakeholders were. Because, as you know, often you'll begin a project and say, "Oh, yeah, I have the final say on this," but when the time actually comes, you'll find out, "Well, no, you need to get this executive director to look at it." So we said, "Who are all – everybody involved?" So we had our subject matter experts and then the supervisors. And the supervisors had management buy-in to make all the decisions, so we knew that once the supervisors approved it that we were all set. The management did view it at the end, but they were communicating along the way with the supervisors, so we knew that we had final buy-in and there would be no extra input at the end. It was us dealing with UAW. We were introduced to this group and we knew that they were union members. The one thing that we had to be cognizant of was breaks, so we would, you know – you have to get a certain break time and then you have to… with the assessments, we had to be careful. There weren't a lot of rules but, again, just being open, you know, because I would sit down with them and say, "Okay, I don't want to break any rules, so you let me know." And they were, the ones assigned to us, were open and generally happy to work with us, of course, because they getting overtime as well. But we had to work quickly because they were on overtime, you know, so once we'd get recording it… I'll never forget, I was recording, somebody that was on the third shift, I was recording with him in the morning and he kept falling asleep. And I thought, "Oh, geez," so I kind of… here I am thinking, "He's getting paid all this money and he's falling asleep," so here and there I'd have to call for whatever and he'd wake up and then we had to re-record, yeah. The supervisors were very supportive, which was – and that's why this project had a lot of buy-in from the very beginning. They were good, yeah. And I think that's why – I use it as an example because things seemed to happen as they should. They had buy-in from management, the supervisors were in line with the management, and then – because, as you know, you have to have that buy-in and the people, the workers, have to know that managers are counting on them to do this. And the managers feel that this is important, because otherwise they're not going to do it.

Q11dvi What software and services were used?

A11dvi As far as software, we used Captivate to record the simulations, Microsoft Word to document the processes, RoboHelp to organize everything, and here and there we'd have to use PhotoShop to touch up a screenshot on something or whatever, you know, because we may have to change a screen on Captivate so we could PhotoShop something and then bring it into Captivate that way. So, yeah, those are the software that we used. No outside services, we did it

all ourselves, and that was another interesting part, because – yeah, I guess that's another part, is we had to manage our time as well because we were doing all the developments. We were responsible for managing all this but then also doing the development as well. I don't remember it being an issue. We did a good job of laying out our timeline and laying out what needed to be done, so it seemed to flow, you know, as we had planned it to, so it worked well. The timeline… no specific plan saying 'do this, this, and this by when when and when', we knew that they had given it a year, so the project manager obviously knew. And I don't know if they knew it would take that long, but that's what they allotted for and then we went in. Once that analysis was done and we really knew what we had gotten into, then we said, "Okay, well, now it's going to take a couple of months to get all these things done and then we're going to have to polish it all up and that sort of thing." So we had all our milestones all laid out and gave ourselves a little bit of padding in there too for things that come up. Periodically we update the manager, they would, and that was kind of the nice thing of having this, because we could show them, like "Here's the simulation that we have recorded, here's how many things we have documented," so we could literally – since we had this prototype going on, we could literally show them where we're at and they could see, "Oh, okay," you know, we didn't have to tell them about something that's out there somewhere on the web. You know, we could literally show them where we're at.

Q11dvii What hardware and devices were used?

A11dvii That PC was really it. They had – everything was off of PC. They did have kind of a specialized… because they had so many pieces of software, they had large monitors that they used, so we had the design for that, you know, for a large monitor. But, yeah, everything was off of a PC. No gas equipment, nothing like that – luckily. We were just in an office so, yeah, that was – it was interesting, though, to learn how the process works, yeah.

Q11e What were the outstanding features of this project?

A11e I would say the thing I like the most is how we tried to cover different learning styles. And we noticed that the much older and—I don't mean to age-discriminate here—but the much older gentlemen liked just the step by step; they didn't want anything to do with the simulations, they just wanted, "Step 1, I go here; Step 2, I go here; Step 3…" Some of the older ones liked the simulation and they would follow it along, so we had the text for folks that just wanted the text, and we had the simulation if they just wanted to watch the simulation. And then after that, we had the practice where we took away all of the hints and everything and you could kind of practice to make sure that you got it right before you sat with your supervisor. So I think that was great in the level of detail, because we gave ourselves so much time; the level of detail we went through, it was just great. And to sit there and watch these dispatchers follow along with the tool that we had created in there, accomplishing these tasks, it was great. So, that's what I would say.

Q11f Did it occur to you that you wish to have done the project differently?

A11f No, I don't think so. I was pretty – when reading this question, I did see the challenge part. I can't think of anything that we would have done too much differently, but the challenge was the gentleman that we were working with and… what I might have done is even sooner work on that relationship. Now that I think about it, I think we could have right off the bat, because we didn't really… we were just introduced to the group like, "These guys are here to develop some training." Looking back now, now that I think about it, we should have went around to each person, to each guy and gal, introduced ourselves, and let them know exactly who we were and that we were here to develop a tool for them. Because I think it took a couple of weeks for them to realize that we were there to help them and not to document their jobs to replace them. So now that I'm thinking that through, again, that's probably something that would have helped us out even more, is if we would have, that first day, just walked around, took an hour, and just introduced ourselves to each guy and say, "Here's what we're going to do. We're going to be looking for your help." We kind of waited to do that and we did it – as we needed somebody, then we would introduce ourselves to them, kind of bring them in to do the simulations and things like that, so we should have probably done that right up front.

Q11g What were the solution(s) to the challenge(s)?

A11g It was tough. The interesting thing about them, I only had that one time where that guy fell asleep. One thing we found out is it's typical for them to do double shifts, 16 hours straight. There was one person that occasionally would do a triple, would work 21 straight hours, you know. So they were used to this and they were… I was very impressed for—again, I don't mean to sound bad—but for their age, they were very skilled with these different systems. And then at the same time, they did take plenty of breaks, which was, you know – I believe at least every couple of hours, they took a break, and they had a room off the back of the dispatcher area, where they had couches and chairs and they were told to take a nap, so they would. They have an alarm in there, so they could set it, they'd take a nap and get up, so that probably helped out as well. But they were very used to this type of work, which I was impressed. It was unbelievable; a couple of fellows just… yeah, and they're dealing with very important issues. People had gas leaks and things like that and you have to make sure you get somebody to that house because it could explode, you know. So, yeah, I was impressed; I was amazed. Yeah, we never worked with anybody that… the people that we recorded, they only worked one shift because they didn't know how long they would be with us. So they would work a shift and then they would drive from their location, which was in an area of Detroit to another location, so at least they had that time to wake up.

Q12a What specific knowledge, concepts, and ideas that helped you?

A12a When I was working on my master's degree, I focused on performance support, and when I was going through it, I interviewed some of the experts in the industry. It was such a great learning experience, and there were so many theories and so much that they gave – I never lost any of that. And I think that

a combination of that… as well as people that I've worked with have also had similar perspective, so I think that helped me a lot with this project, because it was very important that we made this a performance support – I mean, it truly was; it was just-in-time training. And I think that my educational experience, as well as some of my peers that I was working with previous to this, I think that experience really helped me when this came up because it made sense to me the solution that we needed. This classroom training wouldn't have worked; it didn't really have time to take a couple of hours' worth of eLearning. It really needed to be just-in-time performance support type training. So I think the education plus experience from my peers helped with that. It was decided it was just-in-time, because when we were initially starting the project, we knew we couldn't get them in a classroom because they couldn't leave for that period of time, and we also knew that an eLearning course wouldn't really work, and I have a feeling that was because of the length of time. It just made sense that we—because we even had to suggest that because they kind of gave us their limitations where they only had a little bit of time to do this, and so we said, "Well, let's put together this help system, this performance support tool, and we'll structure out the learning. We'll make sure we get the objectives down. However, they can access it when they need to get the information they need to do their job. My perspective is if you have to train somebody to use a tool, then you failed. I think, especially today, but even then, we knew that they were – we knew our audience was technically savvy. We knew that they were really fast on a computer, so we knew that they knew how to open and close and change between windows and things like that. So we knew that when they opened this up, it should be exactly… there should be no questions asked, and that was part of our pilot, you know. The hardest part is sitting back, not saying anything, and just letting… so that's what we do. We said, "Click that," and then they'd go through and we had all of the tasks to find that was very clear in their terms—all these tasks—and they click on, okay, that's what they do, and that was it. But in general, if you have to describe—in my perspective, to this day—if you have to explain to somebody how a job aid works, then I think you failed.

Q12b What soft skills did you use?

A12b Communication was absolutely the key. We had that open line of communication and then that communication helped us to build a relationship. I learned so much – and, again, just talking to you, it led me to realizing that I should have introduced myself to them sooner, but I personally pride myself on the relationships that I built with each one of the projects that I've done since my career first began. Because it isn't until you gain—and then with communication comes trust in these types—it isn't until you gain the trust of your customer and/or your subject matter expert… it isn't until that point that you're truly going to get what you need. When they trust you, then they know they can tell you the little things or the secrets or the whatever, you know. And then they also, when they trust you, then you can help them to realize that this is their project as well and they have ownership. And then I feel that from

there, the project goes much smoother, but I think that all revolves around open communication. Yeah, picking their brains is hard, it is. The funny thing is, and like I said, a lot of times you would say, you know, "What task do you need to do?" They would say, "Well, here's the task." We would say, "Okay, what steps are involved in that?" And then they would give us 40 steps. We would say, "Okay, that's great. Those 40 steps, I'm sure, are very important. But I bet you, does it maybe stop right here with this task and this one starts up here?" "Well, I guess it could." And then we would kind of have to talk them through, "Okay, let's say I'm showing up here for my first day at work. I don't know a lot about this stuff. How would I proceed in this?" "Yeah, I guess you'd have to do that first." So, we would have to talk them through and really… because when you're so close to something, it makes perfect sense to you, and it's just kind of out of reaction that you do these things and you don't think through. That was definitely part of it; it was really getting them to break down the process into even smaller tasks. I think you really have to be very open and when you're—hopefully I'll answer your question at some point through this—but the one thing, another thing that I like doing is kind of figuring people out and figuring out what I need to do to get the information from them, so personally – my father was in a union for 40 years, so I know that at some time union members can be very aggressive and they don't want you stepping in their turf, you know, that sort of thing. And also, living in the Detroit area, I mean, I think you get to learn… just by default, you learn about unions because there are so many unions around. But you have to really… one thing that I like doing is kind of sociology, but really reading people and finding out; you know, when you're talking to them, you can find out just reading their non-verbal whether or not they want to be there or they don't. And if they don't, I enjoy kind of changing their perspective on things and changing their opinions perhaps. But, yeah, I think that you really have to, for me, I kind of used the experience of my – I remember my dad talking about things like that, of union. I remember him talking about that. And then at the same time, having worked in the auto industry, I had an idea, but then in the news, you also hear about union stories and things like that. So, I kind of pulled on all those different experiences for this. Would they have a problem with working with union people? I think so, yeah, because if you just show up there very aggressive and say, "Here's what we're going to do," they will shut you off, you won't get anything from them, they're going to say forget it and they'll just do that absolute minimum and they'll make your very difficult. It could be the same for anybody. I think in that environment, it's even more so because they have the backing of the union and you can't go after them. You have to go after their representatives and then they'll file a grievance, and then… oh, that's even – it's like a legality issue, you know, it can get too big.

Q12c What hard skills did you use?

A12d I would definitely say ISD skills, but then at the same time, you know, we were the ones that were creating the animations and the simulations. We were the ones that were doing the photo editing and things like that, so it's very technical, which it truly was enjoyable because we were able to consider it

from a theory perspective, “Here’s our ISD skills,” but then at the same time, go in and do the animation and the simulations.

Q12d What attitude did you realize that was helpful for the success of this project?

A12d Yes, that’s exactly the mode that I have. You have to stay very open with the group but then at the same time very transparent and just – even show them. And that’s another thing; I mean, when I think about this, we even showed… some of the dispatchers have told us, “What are you guys up to?” And we’d bring more, “Here, here’s what we’re looking at.” We would show them, “Here’s the tool that we’re working on for you guys.” And again, I wish I would have done that a little bit sooner even to kind of break down the barriers, but it was very helpful that we were very open with them. We tried to build the relationship and then kind of showed them what we were doing.

Q13 Which year was the project? What do you wish to have known that you didn’t know back then?

A13 It was actually in 2006. I didn’t write a note on this one. Yeah, I can’t… yeah, I think that… it would have been neat to know that they’re going to accept us so well and know that they were going to throw the party, but… yeah, it was interesting. I don’t think I would have changed much about that project.

Q14 What are the other knowledge, skills or attitude which were not used in the above project but you used in other Web Based Instruction projects you led?

A14 I don’t know exactly how this would be defined, but I found that when I’m responsible for projects and teams, leading by example, I think, is just the best way to go. I’ve never been one to sit over somebody’s shoulder and point things out. A lot of times, the projects that I’ve done, I’ve also had a role in, not just a manager but I’ve also had a role in the process, so… and generally they’ve been very large projects, so what I like to do is stay close and check in, but lead by example, so show hard work, make sure I’m meeting all my milestones, make sure I’m keeping the customer happy, I’m interacting with my team members but I’m also interacting with the customer, and also keeping our leader up on all these things – so that’s probably what I enjoy the most, is being a team lead. For example, if we had a course and there was three of us out, maybe I would handle one or two modules and split the other two up amongst the other two people, so then I could keep an eye on what they’re doing and I would have my own, because I’ve never wanted to lose those skills, so I’ve never wanted to be totally hands off and just say, “You do it,” because I do enjoy it and I work very hard to get the experience that I’ve had. But then I also like interacting with leadership and showing them, because I think when you do a good job of that, it just makes your job easier, because then they understand everything that’s involved in the project, you know. If you just show up with something at the end, they’ll say, “Oh, okay,” but if you keep an open line of communication with your leadership and explain to them this process – because nine times out of ten, they’re probably not instructional designers; they’re probably from another area, you know, they have been brought in to handle this project. So, if you show them, “Okay, we’ve completed our analysis, here’s what we think, now here’s our design and here’s what we’re developing, here’s the graphics that we’re using,” and

then their eyes really open, like, "Wow, not anybody can do training. It takes expertise to do training." Kind of educate them, absolutely, and when a manager sees—because a lot of times, they're familiar with the content but they don't understand how we put it together—but when they see that process, it really opens their eyes and they really see how critical it is to have these skills and to use them properly. They appreciate you more.

Q15 Assuming you are hiring a person as a beginning instructional designer in Web Based Instruction, what skills are you expecting?

A15 As a beginner, I want them… first of all, creativity is very important… open-minded. I really would want to see what they've done. I'm assuming they've done some work, some basic work, because – and you can tell very quickly if somebody has message design skills or if somebody can lay out instruction that's very clear and that you want to see, not something that's just so plain and so boring that you wouldn't want to take it yourself.And for a new person, I want them to love to gain experience and to try new things, so to be very open. So, as a new person, those are the things that I think are very important.

Q16 Assuming you are hiring a person as an experienced instructional designer in Web Based Instruction, what skills are you expecting?

A16 The creativity skill – and I think now, more than ever, people are expecting great things when they take a training course. There's so much rich media out there, you know, Flash and simulations and animations and interactivity. I think over the past, I think learning has changed so much – yeah, I was going to say the past three to five years. It has probably changed more in the three to five years than it did the ten years before that and so much of it is just because the technology. Some people like these terms, some people don't. But I think you have to introduce a certain bit of "edutainment." That's… I don't know, I heard that somewhere – edutainment. Because if you want to get information about how to make cookies, you'd probably go to YouTube, and people want – if somebody's talking to you, you see what they're doing, if there's somebody tasting it, it's good—I mean you can't taste it on a computer—but that… I'm jumping ahead to one of my other answers, but… Somebody that's experienced, I think they need to understand these things. They need to understand how learning has changed. They need to have experience with multiple types of learning, be it somebody that's done a full curriculum, you know, somebody that's had a very structured curriculum. I want somebody that's put together job aids. I want somebody that's done just-in-time training or things like that, you know, performance support. I want somebody that has a good eye for visuals; you don't have to be a graphic expert but a good eye for what looks good, an idea for color and things like that. But the key is that they understand what will make somebody want to take something that they've developed, whether it be a course or something else, and they understand what makes learning stick to the learner. I would say, yeah, it did say project management. I think as long as… yeah, I guess I kind of – because I think so often now,learning experts are just expected to be project managers, you know, because you don't have the teams of people working on project anymore. So often, it's one person that's responsible for the whole thing.

Sometimes you get some graphics support, but typically you're responsible for the whole thing. So I think by default – actually I think a lot of instructional designers have a lot more project management skills that they even think of, just because they have to do it all, manage their time and everything else, kind of internalize, that's a big job. Expect them to have a degree? Definitely. I have very good friends that have bachelor's degrees, very creative, just didn't have the time to take on a Master's degree, extremely bright. So I think at least as long as you have the basic theory, you have a degree that at least you understand some of the adult learning – how adult learning is a little bit different. And I think Oakland... its program is improving all the time. I know Wayne State has a good program. So I think it's important that you understand these theories, that you understand why it's important to keep them in mind, but at the same time, understand that those theories don't work in every instance and that you have to be open, so I think a strong educational foundation is definitely important. But, yeah, I wouldn't necessarily require a Master's or anything like that. I would look more at their experience and the projects that they've done. But, yeah, I think a Bachelor's degree is important.

Q17 Which direction do you see Web Based Instruction is heading to?

A17 Yeah, it is such an interesting time. Over the last six months, I've looked a little less than I did before just because of my path right now, but things are changing dramatically. Today, I think instructional designers have to have an incredibly open mind because there are so many things that they need to pay attention to. They need to pay attention to the technology, because within two years, everybody's going to be designing things for a tablet, like, "Oh, you're off a desktop? What do you mean a desktop? I don't even know what that is." I mean, these kids coming up are going to be, "Are you looking at this from your phone or a tablet? Oh, you're on a laptop." That's like saying, "800 by 600," you know, like, "Oh, my gosh, do it for a notebook?" So the technology, they're going to have to pay attention to. Again, the media, today there are so many tools out there that can help people with graphics and things like that. People are expecting this rich media, this very pretty – because even if somebody wants to develop a web page anymore, there are so many tools for that out there that do so much for you, so people are expecting very engaging experience when they take a course.They don't want to just be told something; they want to be engaged and they want to interact with that course and things like that, and have decisions, "Okay, you do this. Now you have a practice. Okay, if you make this decision, then what happens?" So these decision trees, and there are some neat software… I personally like Articulate because it does a good job of quickly facilitating that, where you can have decisions. You say yes or no to this, then you go over here, and you can kind of design a tree, yeah, very quickly. The other thing too is learners will not waste time with a course. If it doesn't engage them, they're going to be out into the next thing or they'd find another way to learn it. It has to be engaging to them. They just don't have the time for it. And again, they definitely want to experience the simulations, interactions, rich media… again, some people don't like the term

but I think you have to consider a little bit of edutainment. You can trademark that if you want.

Q18 What do you think an instructional designer should do in order to keep up with this direction?

A18 I think the younger ones, this will come much easier for, or the ones that are just kind of just coming out now. But folks that have been in the business a little bit longer – don't stay in that comfort zone. They need to be able to get out of that comfort zone. If they've done something a certain way, perhaps they've been with one company for a period of time, they really need to look and see what else is out there. Just do a Google search and find examples of courses that you would like to take yourself, something that you say, "Wow," then I think you know you're on the right path. Kind of ask yourself… I think ISDs today need to say, "Would I want to take that course? I know they have to, but would I want to?" Because even if somebody has to take it, they'll go through it, but is it really going to click, you know? Yeah, it's just kind of information in, information out. So truly, I think ISDs today need to really think about engaging the learner. So often, we focus on content, making sure that they get this content, but really got to focus on that learner. What is that learner? What can I do to them to really get this information to stick and to make them want to learn? And if they're not younger, stay in touch with the younger audience and find out from them, you know, what kind of things would you like? What kind of things would make you want to take this course? And again, I made a note here: Be ready, because in a couple of years, everybody's going to be developing for tablets, I think. You will learn how to design for tablets! It truly is so amazing, this time where we're at, because people are finding ways to get information all over the place. Again, they're learning from YouTube. They're going to websites, Google, so it's very interesting. I think some people are missing the boat and they aren't changing their skills, and I think those people are doing a disservice to their audience. Yeah, it's funny because people – that made me think because you say "social," but we talk less. I mean, with text message, you say, "How do I get here? What do you think about this?" You know, companies where I'm at, we have blogs and if you want to find out some information, you just look at the blog real quick, "Oh, there's…" So all of that social informal learning, that's absolutely where people get information. I think what you're going to find is there's going to be more of an emphasis on structuring those and making sure that there's somebody watching those boards, because if somebody posts information, you need to have a governance body that's making sure that information is appropriate and correct, so I kind of think that our business is just changing so much and there are so many different facets of it. it's a great time, and I think people that are nervous about that are just going to get passed by. It's those that embrace all these different types of learning – you don't have to be an expert but at least you have to be open to it. Exactly, be aware of it. I do read often. There's a… I like Chief Learning Officer magazine, because it… I have three children. I have a 10-month-old, so I don't have a lot of time. I have a five-year-old, a three-year-old, and a 10-month-old. So for

me, when I go through a website or some of my journals, I mean, I'll just kind of pick and choose the things that I'm intrigued. And with that software that I mentioned, Articulate, there's a weekly email that they send out with some tips and tricks and things like that, that I… and some of it was specific to the software, but other was just basic ISD like, "Have you thought about doing this?" And it just kind of gives some ideas. So I kind of pick and choose here and there of the articles that I read. I was with the ISPI, but again in the last seven months, I haven't really kept up on that. I really should. I've been… with my new position, it's been very, very busy and – not overwhelming but close, so I need to kind of, you know… and talking about these things makes me realize that I've kind of missed that over the last six or seven months. I want to get back into those things because it is a little different what I'm doing now, and I'm very happy with the changes I've made. But, again, I don't want to lose those skills and things like that, and I think it's very important to be part of those. I'm pretty fortunate where I have some peers that I can kind of talk about that with and I have a training group that we're affiliated with, so they know my background. So once in a while, we'll talk training talk, you know. So that's kind of how I keep up on that. It really is great because they want us to do – just recently, they asked what seminars and things like that would we like to go to, so I need to go and find out what… because I haven't been to the consortium or any of those large events, but those are the kinds of things that I need to – or even smaller ones, you know… yeah, even the local ones. I've kind of been. Again, I kind of pick and choose and I'll read articles and things like that, but it probably would be… I do need to go in and actually be a part of them physically, you know, and not just… I need to get better at that, that's for sure.

Q19 Anything else that was not covered in our conversation but you think is important?

A19 I don't think so. I couldn't think of anything else. These were all really good questions and I hope that I got across some decent answers for you.

Transcription of Interview 014

Q1	Good Evening, thanks for taking time with me. Can you tell me your current job title?
A1	You are welcome. Senior Instructional design consultant.
Q2	How long have you been working in the current position?
A2	Three months actually.
Q3	What's your age range: 25-35, 36-45, 46-55, and 56 above?
A3	36-45
Q4	Would you say you are actively involved in instructional design?
A4	Yes
Q5	Are there any other positions have you held before, that were related with instructional design?
A5	I had a brief job right before I came to XXXX as director of employee development, but honest it was more than an instructional designer job than a director job, I was a director of myself. It was a very small department. And then prior to that I was an instructional designer in a different company that goes back to 2004. Instructional designer was my title.
Q6	How many years accumulatively do you estimate you have worked in design/development for WBI?
A6	Ten years. In fact I was a Web based instructional designer before I was actually an instructional designer.
Q7	In those WBI projects, how many years accumulatively do you estimate have you served as a lead instruction designer/developer?
A7	I would consider a lead all those ten years.
Q8a	What's the major of your bachelor's degree?
A8a	My bachelor's degree… I had a major in telecommunication, such as corporate video, minor in English and a minor in theater.
Q8b	Did you have postgraduate education: Master's, or Ph.D.?(What's the major?)
A8b	And my Master's is in Instructional Design.
Q8c	Have you had any other training on instructional design?
A8c	I haven't been to any professional workshops; my companies haven't had enough to send me unfortunately. I do get to go to one this year, now that you mention it, I am very excited.
Q9	What's the business nature of your current organization: business/industry, education, government/military, and health care, independent, other?
A9	Health care.
Q10	What's the estimated size of the organization you are working for?
A10	Around 44000 employees right now, about 40 people in our training department. We had two big groups merged into one, and that just happened in November. Actually I got in the day before they merged, believe it or not.
Q11	Can you tell me a Web Based Instruction project you are very proud of or got highly recognized?
A11	There are so many to choose from. All my projects are my babies. Why don't I talk about one I won an award back in 2004? It was a blended learning type solution. We had one element of it that was virtual instructed led training.

Then there was the second portion of it was self study via little online activities that we did for them. It was for a school system in England, which is really interesting, because instead of designing for adults I had to design for high school students, which was a bit more challenging that I ever expected, especially when they are in a virtual classroom type environment. We learned a little bit about those types of students. It was an extremely challenging project just because there was a blended learning solution with so many different elements to it. Trying to keep a ninth grader engaged was not easy. First of all, we designed some things that typically would work for an adult learner. We designed activities that would use the whiteboard, for example. We learned pretty quickly that you cannot use a whiteboard with ninth graders because there will be doodles and swear words and all sorts of things on that white board in five minutes. This was my prior employer. This was actually several years ago. We were basically the vendor and the school system was our external customer.

Q11a How many team members in the project?

A11a It started out as me. I was the lead instructional designer. I just wanted to give you kind of an idea of how long the curriculum was. We had eight courses and each of the eight courses was divided into forty modules. It was an absolute huge curriculum. I was the lead instructional designer on it. For a while, I was the only instructional designer. Eventually we brought on two more. We had a graphic designer who was awesome, because we did amazing things with graphics. We came up with really fun metaphors and ways of looking at things. Each of the modules had a theme that was age appropriate for the kids. Visually, this course was stunning. I love my graphic designer. Then we had a Flash programmer. The Flash programmer did most of the Flash development for this particular course. I did not do a lot of development on this course, which is interesting because I do tend to like to do the development. But on this particular curriculum, I don't think I did any. I maybe helped edit some of the online Flash activities. I was so busy designing and there was a textbook that went along with it. I was writing the textbook as well. We did not actually use any humans in the SME. Let me tell you why. It was because it was based on an approved curriculum, the European computer driver's license. It had nothing to do with driving. It had to do with computer literacy. But they publish basically a syllabus that has very stringent curriculum guidelines, very stringent objectives, and in order to get this certification – because they could take a test at the end of this and get the certification which was a fairly big deal in England, I believe, at the time. I suspect it still is. So we had to follow and prove that we met the criteria based on the syllabus. It was computer literacy, so we basically used modified from textbooks and from our own knowledge of Windows based programs. I would actually have to learn the program and then teach it. Actually, it turned out I was SME, and the textbook is the reference. I did not manage the whole project. We did have a project manager. He would do the oversight of the larger team. I was doing the oversight of the development team, so those two developers that I spoke about and the two instructional

designers I spoke about. I was the team lead for that. I wasn't there direct supervisor, but I led the team. I would report to him, but he also had other responsibilities like going out to England where were hosting this course and training instructors out there. Making sure that the testing sites were up and running, because there was certification. We had to run testing through outside testing sites.

Q11b How long did it last?

A11b We started in April and I think it was the next February when we actually had the first running version of all the modules, and then of course we did revisions after that. So nine months from 2004 to 2005.

Q11c What was the project about, was it about how to complete a step, process, use systems, or how to perform physical jobs, or change attitude/value?

A11c We definitely did ADDIE, because it was a unique project, it wasn't for a company – we weren't trying to solve a problem for a company. We were developing basically a product, a curriculum. It was a little bit adapted, so analysis in and of itself. We didn't do a lot of needs analysis upfront. We had the objectives. We had everything for us. We use that as a base. We went through the design, the high level outlines, a high level design document.

Q11di Describe the project in a very high level (the process by stages)

A11di I did a high level design which basically outlined the topic and the types of activities that we were going to do during the class and their online practice activities and that type of thing, as well as we outlined – each of the courses had a theme. In addition to the design document, we sort of outlined a little bit of creative treatment, like the theme, so that went around that. The design document – and I've seen really, really detailed design documents, but it was not that detailed. It really just listed topics, the amount of time we thought it was going to take and the activity that went along with it. From that, we started to build the storyboard. We use Word. I built a couple storyboard templates because the company that I was working on did not have them. We did a couple of iterations in PowerPoint and we did a couple of them in Word, and the designers fought for the ones that they wanted to most. I actually preferred the PowerPoint, but I think we ended up doing it in Word. So we went through the storyboard process. The review cycle, since we did not have a client or a client team to review, it was pretty much peer reviewed by other designers. The designers that I had working for me, say they were like freelancer or the other ones that we had on staff, I would review the design documents and the storyboards. If it was mine my boss would review them. He was the one who signed up the content. After the review of the storyboard I would go and of course make the changes. Then I would hand that off to my development team that we worked very closely hand and hand. My Flash developer and my graphic artist are extremely talented and creative people. They would take a lot of what I had written and they would take it even further. They would actually come up with a lot of their own ideas and how to make some of my things even better, which is something that I don't always get in some of the teams that I work with. Some people just want to take what you give them and do it exactly as you say. We really were a

collaborative and creative team and it was really fun. From there, we would develop the course. We had the virtual instructor led training, so we would build the slides for that course and then they would build the online activities. Then we did a pilot and I wasn't there for the pilot. It was in England. We did that after the first course was in Excel, either Excel or Word. It was one of the two. That's when we started to learn that some of the design elements that we had put together, like I had told you before, using the whiteboard or using app share to show them different things in Excel wasn't going to work for our environment because in a lot of places and in a lot of the schools, they had the computer programs locked down. After the pilot we really had to go and revamp some of the way we designed it, especially the first couple of modules we did a redesign before we went live in the classroom. After that point a lot of things overlap each other, so we are doing the redesign for a couple of the course while we're designing the remainder of the curriculum, the next semester's curriculum. We seemed to always be maybe six weeks ahead of the teachers. I think I told you it ended in February, so you think of it like it was a school year. There were two semesters, so we ended in February of the school year and it ended in June. We were right behind them, and leading them as we were done. I still think this particular project is being done live in the schools. I'm not quite sure how many iterations they have done at this point. But this was the first year. So design development, implementation – again, I wasn't really involved with implementation as much as the project manager was. He was the one that was going out to England and meeting with the instructors, meeting with the schools. Evaluation, like I said we did a pilot. We had our little smiley sheets. We did a lot of validation of the tests, because that was required for the curriculum. We worked with people. We wrote the first version of the exam and then we worked with the testing center to do analysis of the exam for validity and reliability, and also that it met the requirements of the program. Evaluation was really interesting because the end result we wanted these kids to pass their certification exam. We did that item analysis which was really telling to see where the program was weak, where they needed more practice, and which things we needed to beef up. That was part of the redesign, as well. I do not remember the results. It was really long ago. I remember some of the modules were really high. Some of the modules were a little bit tougher. But I don't remember what those results were. It was a really revolutionary way to deliver learning at the time. I think that's one of the reasons why we won the award. At the time, first of all virtual instructor led was not being done that way, and it certainly wasn't being done in a high school. The name of the reward, I think was called the Rolla award. You probably haven't heard of it because it's in England. It was for blended learning design. It was on par with an ASTD award or something like that. It's a pretty big award. Again, I didn't get to go to England to accept it either.

Q11dii Describe the project in as much low level (steps, tasks) as possible

A11dii It was a long time ago. I try to get as detailed as I could. We were a small tight nit team, so there weren't so really a lot of client meetings that we

needed to document and those types of things. It was really about a team working organically together to create a product. Like I said, when it comes to the storyboard phase, those are the things that I'm remembering the most because there was a lot of debate on which storyboard version that we were going to end up using for the rest of the project. There was also some difficulty once we started doing revisions and how to communicate the revisions to the development team. Now I just remembered something. You were talking about SMEs earlier, but not that you made me start to think about forums and this type of thing, we did have SMEs out in England who were certified in this ECDL training. They were certified instructors. They were certified to teach the curriculum. We did have them review the storyboards before we developed them, and we did have them review them afterwards. The review process was probably what you're used to. If you don't give them a form to use, they are just going to give it to you. We had to create all these forms from scratch, or I had to create all these forms from scratch because they – I was the first instructional designer this company had ever hired. I was fresh out of school. I had done some contract work, but this was my first instructional design job. I'm kind of making it all up as I go along. The starting is kind of a funny story. I don't know if it's going to help your research at all, but I was doing contract work with one of my professors for this company and he had recommended me to another person. So they called and I interviewed with them. I liked them. They liked me, and I was excited. Actually, I wasn't even done with my Master's yet. The first couple of months I was doing my final project, as well. I'm squatting in this office which turned out to be the president's office. He just wasn't there that day. He happened to come in. This was like my first day. He was like, "So did anyone tell you about this ECDL training we want you to do?" I'm like, "Oh, they've told me a little bit about that." Then he was like, "Did you know we have to have the first course done in six weeks?" I said, "What!" Remember, I am like fresh out of school. This was my first real job and I'm the only instructional designer on the team. So I'm like holy crap, can I even do this? Do I even know what I'm doing? The first thing I did was to get a copy of the syllabus. They had a copy of this thing. It was a 20 page document, but it was 8 point font and it was just an outline of all the topics that you need to do. It was actually quite daunting. They gave me a book and I said to my boss, "What do you want me to do first?" He was like, "Start the design document for module one." This was the guidance I was given. I didn't have to do a task analysis. Everything was pretty much handed to me, which was like I said it was light on analysis. I didn't have to do that type of thing. The way we decided to teach it and the approach we took and the order that we decided to teach it in, these were all decisions that me and the team made. But we could teach it and design it and show it in any way that we could. We just had to make sure that these 1,050 topics were covered. I was designing for a good nine months solid. But that was either a new module or a revision of an old module. So I could be doing a design document for one module, a storyboard on another, while they are doing development and then also managing the

evaluation. This particular team was very informal. We had like a little cue bank, so the developmental team actually sat in a little pod. It made communication really easy. As for the tracking, we had an Excel spreadsheet that we had worked with. It sort of bypassed project. The project manager put this together. We would talk as a team to update this. He had all the modules and all the moving parts in his Excel spreadsheet and he would keep track of tasks in the spreadsheet. I don't think he tracked the number of hours we were spending on it or that type of thing. As long as it was getting done and it was getting done on time, he was fine. We didn't have any deadlines, it all has to be done by this day, but we did know the instructors are teaching and this is their schedule for this semester. Each semester we would get the schedule, so that arbitrarily gave us our deadlines. They start teaching on September 1st, so we have to have the first four weeks done by that date. We tried to stay at least a month ahead of schedule. One to three months ahead, but sometimes some of the more difficult modules took a little bit longer. The Access course in particular was a bit of a bear. There was no project plan for this. Project Manager's Excel spreadsheet was the plan. It certainly wasn't presented to me before I started working on it. I didn't have to worry about budget. It wasn't the type of company that put a bill rate to your hours. We certainly put a lot of overtime in on this project. I think overtime work was expected. Honestly, it was probably a little bit of both being self-imposed and expected. This was a pretty enjoyable experience for me. I was single at the time and much younger at the time, so I enjoyed putting the hours in on the project. It was a lot of self-imposed overtime. But it was also a little expected because you had to make the deadline. I mean you can't have the instructor leading a class with no material. It was only me to begin with. Then, yeah, they did get probably a little bit more money. I don't know what was going on with the budget at the time. I think there were a lot of wealthy people who wanted to make the investment in this. This was a product they were building and so they were investing in it. They were kind of throwing a little bit of money at it, like I said, not a typical project in that sense. It wasn't a one person project. I was glad to have the other people working on it too. Plus, being such a new instructional designer, I really liked to get the chance to learn from other people too. They did put some more seeds into people on the team eventually. As for the other two designers, the one designer had several years of experience, actually. The other one, he was a contractor. He also had several years of experience. His stuff needed a lot of revision. So even though he had quite a bit of experience, it needed quite a bit of revision. He was the kind of designer who doesn't think less is more, he thinks more is more. So at first, it's got to be a 45 minute class. We got to get rid of a lot of material. He had some great ideas, but it was too much. It definitely needed to be cut down for the timeframe. He wasn't actually offended. The other gentleman that they had on staff was much more seasoned and I didn't have to revise his work as much as the contractor. But I think he probably would have been offended if this young lady with six month experience critiques his work. He took some constructive criticism. His work didn't need to be edited as

much as the other person's did. I learned a lot from him actually. My Project Manager trusted me. I think I did make a good impression on him. To this day – and this project was eight years ago – he was like, "I don't know where I would have been if I didn't have you on that project." That's a compliment.

Q11diii What event/communication marked the beginning of the project?

A11diii (Answered above)

Q11div What event/communication indicated the completion of the project?

A11div They still might be working on it now. I don't know. Certainly at the end of the school year and when we completed all of that was like – you can consider that the end. At that point, it was revisions and getting ready for the next school year. You can say the last day of school.

Q11dv What was your role in the project?

A11dv Like I said, I was responsible for designing and coming up with the theme of the courses in each of the modules. I was responsible for doing all of the storyboarding which included all of the scripting and all of the writing of the course. It wasn't a fully scripted course, since it was instructor led. Interestingly enough, we did not join an instructor guide for this course. I don't know why we did that. They said, "We don't need that. We don't need that." So I'm like, "Okay, we don't need that." I don't know why we didn't do that. He kept saying, "These people are ECDL certified, they should know this stuff." We had some really crazy metaphors and we would do slides like the topic would be like columns and rows in Excel. We would create these graphics that would show conceptual, kind of crazy columns and rows. So we would have a crew team rowing across a lake in front of the Parthenon with the columns. We would do things like that all the time. I hope kids like that . We just did all sorts of fun stuff like that. We did one on the Access course, it was building your own jukebox, we did little slash things that they could click on during class on their screen while the screen is actually leading it and it would give them a little fact about music or something like that. So we designed some pretty creative elements even though it was virtual instructor led, that they could actually interact with the sites themselves. I'm telling you what I did. I did the storyboarding. I wrote what they called a study guide, but basically it was textbook for an accompanying principal textbook for each of the modules with the screenshots and steps to do certain things and any of the concepts that they need to learn, glossary, so they could print it out. I designed the learning activities, I think I mentioned. The textbook and all of the online learning activities were part of a learning center, so we designed the learning center that they could go into after class. Each module would have practice sessions. So they would either – we tried to use Captivate at the time for some of these, but I don't know if it was because the machines were using were so old and Captivate was so new at the time. We had some problems. We ended up doing these all in Flash, like the little try it and show me. They were a little bit more fun than a typical try it and show me. We did puzzles and some really fun activities that I designed and the developer developed. We put that in the learning center. I was leading all of the changes, ongoing changes, from the SMEs and logging those and managing the team to create

those changes. I worked with the team to come up with creative graphics. I would come up with the metaphors typically. If someone else had a good idea then we would incorporate it. Typically, I would come up with the metaphor and the graphic designer would take that metaphor and do something with it. What she ended up doing which was interesting is we would purchase images from ClipArt.com. She would take them and she would manipulate them and make them something completely different. I don't think there was one graphic that we just purchased from iStock or Dreamtime or ClipArt and put it in there. She took everything and she created something out of it. It was good stuff. The one learning activity that I can think of is we did one – it was sort of a try- it -and -show -me. It was for the class on how to use the Internet. It was simply how to download a song from the Internet. So that was one of the types of things that we did, but we used popular songs at the time. It was like a Captivate would have been, but we pretty much created it using screenshots and manipulated types of things. We took lots of screenshots. We had one computer that was just there for screenshots and basically had to build. Since the activities they were doing were built off one another, the screenshots had to be taken in sequential order. We basically had to use a computer that didn't have any other files on it except for what we were building. If we had to take one out of order, we would have to change the screenshot. It was like you were building a folder structure, you can't have something there that wasn't there before, so we needed basically a continuity editor. So that was the show me and try it for downloading a song or for adding a column or a row in Excel or using certain functions and words. We had those standards of show- me - and try -it. From the activities, we used it for to test vocabulary, we had some crossword puzzles in there that Flash base crossword puzzles. We would drag and drop exercises. We had some pretty fun things in there, just little games and things like that. We would design little things like self-study part that were intended. Some of them were intended to be done during the session. So the instructor would teach and then they would give them a chance to practice or to do the little activity, so we put them in there. We had a problem, though, because as I mentioned a lot of the computers while classes were going were locked down. Some of the classes that had less strict security guidelines got to do some of those during class, but a lot of them were assigned as homework where they could do them at home or when they opened them back up again. That was something that they had to do. That was a constraint that we didn't know going on starting the project that we had to deal with and we had to adapt afterwards. We had to get creative. To attract their attention, like I said, each of the courses had a different theme and a metaphor. One that I remember offhand that I thought worked really well was the database course that we did. Because we had them build an online jukebox as their database. So I think kids really relate to music. I got to do a lot of research on new bands and listen to their music. We incorporated a lot of themes that would keep them engaged. The course would start with a current song at the time. It would be playing in the background, so that would keep their attention. They would interfere at the beginning, like when they are

doing checks and making attendance, just all the little housekeeping things that you need to do while you're at the very beginning of a web session. They were all 45 minutes long like regular classes.

Q11dvi What software and services were used?

A11dvi This project was a long time ago so a lot has changed. We used Captivate. We abandoned Captivate. I use Captivate now and I certainly don't have the problems that we had back them. We had some problems. We used a lot of Flash. The tool that we had used for delivery the online sessions was sort of a product of the company. It was called GGGGG. It was similar to a WebEx type of session, WebEx type of software. For graphics we used Fireworks and Photoshop. I'm sure we used Dreamweaver, because we needed to build web pages. I'm trying to remember if we actually had this. We had this in the LMS, and the LMS that we used was TTTT. It was TTTT. As for questions, we used Perception Question Mark. I think we used that for testing and surveys. We did do evaluations. I don't think we did them after every session. I'm trying to remember how often we did them. Kids are not as good about filling out those types of forms as adults are. The feedback we got is better enough when it's adults. You don't really get that great of feedback or you can't do that much with the feedback. It was worse with the kids. They are not used to filling out those sheets after their normal classes, either. It's about like every class in high school. You evaluate your instruction. I think I must have designed the survey questions. Many softwares like Great Point Live. You would say web software or something like that.

Q11dvii What hardware and devices were used?

A11dvii Not that I can think of. We didn't do any recording for this particular course. We really needed the computer to capture things. I think we did use another program or software for screenshots. I think we used SnagIt. Hardware is now pretty much, the computers for it – interestingly enough, one of our instructors was blind. He had a lot of interesting hardware, but I don't think that is probably relevant to your research. He used it, but we certainly didn't need it for the project. He was legally blind. He could see a little bit. Instead of like a normal computer screen, he basically used like a huge flat screen TV as his monitor. For certain things, he had text readers. He does pretty well, because he was Skyping with me nonstop there for a couple of months. Every once and awhile I will still get a Skype from him. He somehow gets around.

We actually used Skype a lot for this project, and this was back when Skype was a baby. I could write to him, too. If he got it big enough, he could see enough with his glasses and his huge, huge monitor that is still bigger than my TV to actually see it. I never actually noticed an impact honestly. He did kind of clue me in to certain things that I didn't know about, like not using certain colors for directions, making sure that there is contrast between lines. No one else had mentioned these things before. "Why can't I make my instructions in green? Why not?" He taught me a lot about accessibility that I don't think I would have gotten otherwise.

Q11e What were the outstanding features of this project?

A11e I think it was just really innovated at the time. I think the learning center that we put together would be activities. I think those were really, really well done. I think users were really, really pleased with it. I would like to know if they continued with it. They were really happy with it. It's not like something they purchased; this was something that was provided to them as a necessary service. I think they were really happy about it. People were thrilled about the award. We got a lot of great feedback on that. As far as end users, they were kids. I think they were less bored than they were in a normal classroom. If that's the case, I think we are just happy with that. I cannot think of anything more.

Q11f Did it occur to you that you wish to have done the project differently?

A11f The whole thing was a learning experience for me. Things that I learned the hard way were I think like to find a way to communicate changes to the development team for online courses in particular. I have worked for a lot of companies and I think that's – it leaves a lot of room for ambiguity. You have to find a really good and efficient way to do that. Some people like to write them on a piece of paper and give them to you. Other people are good with a spreadsheet. One of these days I really want to talk to someone who has perfected the process of change control. That did not go very well. I would have done that differently. Changes like when we were running the course we did the pilot or the SME would come back and say, "I don't like this slide. I would like it to say this instead of that." I know my developers didn't like to hear that. They took it very personally, but they would not get mad at the person who was doing the review. They would get mad at me, or they thought because I was the one who was communicating the change log to them that I was the one who was instigating the change.

Q11g What were the solution(s) to the challenge(s)?

A11g I still think my graphics designer to this day thinks I just added changes to that change log to make our life harder. But I would have to take things and I would have to interpret the SMEs comments or the reviewer's comments and translate them for everyone else and consolidate the feedback, make it very clear what change needed to be made. It's not always an easy job to do. I spent a lot more time with the change logs. When I first started doing it I would say, "Okay, the change log came in. Here is the change log." That was a disaster. I spent more time on consolidating it and putting it into language that the developers might understand. Sometimes just little pep talks, "Don't take it personally." Things like that. But I think we're all under a lot of pressure. Changes are more work. Because we were working on so many different parts at the same time, it was hard to keep things straight. We had the schedule – we had the class schedule – so pretty much the next session that was going to happen we would make that the priority. It was based on the day that they were going to teach. When we were doing the changes usually there were two courses/classes that had already been done, so those took a little less priority depending on which stage they were in the changes.

Q12a What specific knowledge, concepts, and ideas that helped you?

A12a I think it comes down to Lum Tech Autonomy, honestly. I was coming straight out of school, so using Lum Tech Autonomy, using that to develop learning. I didn't have to develop the objectives, but I did use that to structure some of my learning activities. I definitely use that. I still use that. My husband is going back to school to teach and he brought a book home on Lum Tech's Autonomy and I laughed really hard. Like, "You will use this." He was like, "No, I won't" "Well then, I will use it." From knowledge of message design definitely I am cognitive load. I'm trying to base these cognitiveload principals since this was a very visual course. Knowing chunking and pacing, I know that's really not any type of theory, but it is a skill and it is important. I don't think I could shift a lot, because I really never had any K-12 experience. I shifted a little bit trying to make things at a quicker pace more visually exciting than I would have in a course for adult learners, less discussion time and a lot more lecture time from the teacher. In this particular format using like didactic questioning doesn't really work. Just pretty much quicker pace, more visual, and a little more demonstration and practice during the class time.

Q12b What soft skills did you use?

A12b Negotiating skills with my development team and those review cycles. Basically, when can you get it done or negotiating skills also maybe with SMEs, like, "Okay, we can't do that, but how about if we make this change instead?" Negotiating skills, communication skills within the team. Definitely personality is there. One of my developers was a bit of a control freak. Communication skills on trying to loosen them up and work on a team in a team environment, instead of being a one man show. One thing I didn't mention that I think is just almost the number one thing for an instructional designer is just basic writing skills. You wouldn't think it but I know a lot of instructional designers and people who have gone through programs and got straight A's, undergraduate studies and things like that, but they are just not good compelling writers. They eventually took jobs on performance consulting and not in instructional design. I think that's something that's extremely important for an instructional designer, is writing skills. Teaching myself how to write for an 8th grade audience, no matter what the audience, was something that was very hard for me in the very beginning, to write things that are clear. Even if you are working with adults – I mean you know this – you want to write at a lower level. Teaching myself to write at a lower level was difficult, I think. It is critical to being an instructional designer. I think I'm still perfecting that skill. I think back to the project that – are you still there? I think when I first started working on the project – that was one of the first projects I ever worked on. I would be really frustrated if someone read something that I wrote and it wasn't clear. I would be very frustrated. But I have learned and I have started to learn that the things that people read that they have trouble with, and I have adapted my writing style to that. One of the soft skills that an instructional designer needs to have is sort of a thick skin. Because it's hard because you create something and its tangible and people can look at it and review it, and in order for it to become better you

have to put it out there for people to review, critique and change. That's really the only way to make it better. Sometimes that can be a very hard thing to do, especially when you're young and that used to that type of thing.

Q12c What hard skills did you use?

A12d I certainly think it helps instructional designers even if they don't have development skills in Flash or things like Articulate or Captivate or Lectora or any of the number of programs people use to create eLearning. Even if you don't feel like you have the desire or the capacity to learn these programs, I think it is important to know them at a fundamental level so you can design interactions and you can design learning that your tools can do. I usually specify the graphics. That's because I particularly like – I think part of instructional design is designing the page, as well, because people learn by the visual as well as the narrative. I know a lot of instructional designers fight me on this and just say, "Let the graphic designer do the job," or "Let the developer do their job." But sometimes I have worked with developers who are really good at that, and I have worked with developers who will just do exactly what is on the storyboard. If you are doing a storyboard in Word where you really can't manipulate a graphic and place it exactly where you want it, it sometimes is difficult. I do adapt my storyboards based on who is developing them, so sometimes I will write exactly what I want. Sometimes I will give them exactly what I want. But some graphic designers or developers that I know really have a grasp on instructional design and thinking about learning and how to design the page to facilitate learning. I will let them have more free reign. Key software for eLearning, like Word, which are sort of the basic things but you can use it for quite a bit, PowerPoint, definitely. I really do like designing in PowerPoint. Visio is helpful. I know there are some mind mapping software out there that people like to use, as well, but it is just like a fun thing. I think Microsoft Project and Excel are good if you are doing any type of project management along with your instructional design. Of course, it depends on your function. Basically you could be an instructional designer and know Word and nothing else. It helps to know other things. I know I like to do a lot of my own development. I think Articulate is great. Captivate is really great for an instructional designer that doesn't know a lot of Flash or programming. Those are great, great tools except for the whole Flash output thing. It's difficult because instructional designers and developers, that keeping up with technology is so critical. It's always changing. People are using Articulate but now that we are using more mobile devices that don't support Flash, we have to rethink these things, so you got to keep up with these things. Even if you are not doing the development, like I said, just so you can design things that are going to be successful, to utilize the best features of each of the tools that you are developing in.

Q12d What attitude did you realize that was helpful for the success of this project?

A12d You have to be comfortable with ambiguity and change. I think that's critical. I think if you're comfortable with ambiguity and change that helps you have a more positive attitude in designing. Because when you are designing your project you are starting with something big and abstract. Every project that I

have worked on is big and abstract at the very beginning. I always say that I like to create – I'm really good at creating order out of chaos. I think that's part of our jobs, you know, to take those abstract ideas and create something tangible that is going to produce behavior change and produce results. Be comfortable with chaos but strive for that order. I think I am organized. I kind of go back and forth with process, with the ADDIE process or with process in particular. You need to know when you need to follow process and you need to know when it's okay to go a little off track, in order to make your project successful. That's adaptability, so you need to be organized but you need to be adaptable, as well. Don't be so married into your processes and your documentations that you miss the bigger picture.

Q13 Which year was the project? What do you wish to have known that you didn't know back then?

A13 It was 2004. We talked about a good way to do changes. For that project that was the biggest pain point, so that's certainly something I wish I had known how to do better. Yeah, manage the change control process. I certainly used techniques over the years that could have helped me on that project. That project, because it wasn't just a normal web based course. It doesn't have some of the nuances as some of the courses I work on now. I remember one of the first true web based course that I worked on was Audio. I had no idea how boring a slide would be with a minute and a half with audio and only two visuals. I wish I would have known at that time, first starting out, a magic formula of how many times you have to change graphics based on the amount of audio. I'm still not very good at judging the length of audio based on the length of my scripts. I'm getting much better at that, but I wish someone would have told me that a thousand words of audios equal this amount of spoken text or something like that. I wish I would have been better prepared for some of the ways we got off track, because I designed something for a technology in the class room that didn't work or I couldn't do. Researching technical specifications was something that I never really considered. Someone gave me a list of text and I said, "Okay, that's going to work for everybody," and it didn't. So knowing to now trust technology and always have a backup plan. What I was talking about was when I designed some whiteboard activities or when we designed the practice activities that were supposed to be done during class, and then we found out that we couldn't launch them or we had to disable the whiteboard because they were so behaved.

Q14 What are the other knowledge, skills or attitude which was not used in the above project but you used in other Web Based Instruction projects you led?

A14 I think creativity. I'm sure you have gotten that a lot. Being able to design for each of the different modes of learning, design for visual learners, designing for hearing based learners or tactile learners and even if you don't learn that particular way. I think knowing a little bit about graphic design helps. I think knowing a little bit of development always helps and positive attitude helps too. There are so many ways to describe a positive attitude, but you have to be able to both work in a team and also be able to work very

independently, if you have to. It is just like when you are running through the cycles, when you are in analysis phase, you need to really be listening and watching and paying attention to the people around you and what they're doing and really absorbing and grasping everything. In the design phase, you have to sit in a room and write. But once you get to implementation or development, then breeding and managing and leadership skills kick in a little bit more, consulting skills. A lot of clients – and not on this project, but with clients that I have had since then – they don't understand what the process is or why we go through it, so educating them and consulting them, using those consultative skills are important for most instructional designers as well.

Q15 Assuming you are hiring a person as a beginning instructional designer in Web Based Instruction, what skills are you expecting?

A15 I would expect them to have some educational background in instructional design. It doesn't need to be a Master's. It could be a different field, but I would expect them to be able to know what ADDIE is. They need to have good writing skills. That's critical. I definitely would want to see writing samples, a portfolio, if they had it. And this how I can always tell after working with a lot of contractors if an instructional designer is going to work out or not. You need to be able to write an objective. That's a basic but a lot of people that are out there calling themselves instructional designers and they cannot write an objective.

Q16 Assuming you are hiring a person as an experienced instructional designer in Web Based Instruction, what skills are you expecting?

A16 If someone was coming out of school right now honestly I would expect them to have some development skills. For a web based instructional designer role, I would expect them to know something, whether that's Articulate or Captivate or Flash. I would expect them to have some graphic capabilities. Some of the older instructional designers don't have that, nor do I expect them to, but if it was someone fresh out of school I would expect that. I would define someone as an expert if they had worked on several different types of projects and not just one smaller project or standup solutions, maybe some instructor led standup solutions as well. I think as an instructional designer, even if it is just for web based, you are always expected to do a little bit of everything. They also need to have really good analysis skills and know what it takes to get a project implemented. If they can't do it on their own, at least they know the correct questions to ask. I think for a seasoned instructional designer, knowing that they have some consultative experience or experience working with clients. I'm not caught up on whether they have a master's or not. But again, I would expect them to have education in a related field and more experience in instructional design.

Q17 Which direction do you see Web Based Instruction is heading to?

A17 Oh, that's a good question. Mobile learning is definitely one. That's certainly what I think of when I think of the future. I really do like the concept of the social learning community. I'm not quite sure if it's going to take, but I would like to see it take. If social learning communities and things like that do start to become more of a trend and people start using them more, I do see

more informal learning opportunities and more collaborative instructional design. Less on us and more on them, so designing learning that uses the learner as the SME, so to speak, if that makes any sense. We might be teaching things how to use YouTube more often than do design document, I don't know. Definitely with technology we are going to be able to do a lot more video. I think there are courses out there that do a good job of online learning for soft skills, but a lot of it doesn't. I think in the future we are just going to get better and better and better at that, with the technology of teaching soft skills. The more bandwidth we have the more we can do with it.

Q18 What do you think an instructional designer should do in order to keep up with this direction?

A18 I am always on forums. I think at this point if you are going to keep up with technology in the field, that's probably the best way to be, whether that's your LinkedIn group or the Articulate user community or the Captivate communities. Those are great places to start. Conferences, like I've heard really great things about the where people can talk, but you can't do that every day. Online forums, I mean there are ASTD and ISPI. We are missing that ISPI meeting tonight, by the way. I have been at one point in time or another, a member of ASTD or ISPI. I am not an individual member right now, but now that I'm at YYYY, I can go to the events on a group membership. I tend to go when I like the topic. I haven't had the chance to go the national conference, but perhaps I will go this year. I have to decide on which conference I want to go to. I was tasked with that today, to decide which conference I want to go to this year. So I have to figure it out. My department is going to pay for it. I probably am just going to go.

Q19 Anything else that was not covered in our conversation but you think is important?

A19 I can't think of anything offhand. We covered quite a bit today.

Transcription of Interview 015

Q1	Good Evening, thanks for taking time with me. Can you tell me your current job title?
A1	No problem, I think I am calling learning developer
Q2	How long have you been working in the current position?
A2	6 weeks
Q3	What's your age range: 25-35, 36-45, 46-55, and 56 above?
A3	36-45
Q4	Would you say you are actively involved in instructional design?
A4	Oh yes
Q5	Are there any other positions you have you held before, that were related with instructional design?
A5	Before this, I worked as an instructional designer at XXXX, I worked there for two years. And before that, I worked at YYYY roughly a little bit over two years and they call me performance improvement specialist, but I did exclusively eLearning development. And I contracted with a company before that, and that was about a year. Before that I was a POS, which means Point of Sales and I developed all web instructional design work and I did that for about two years. How far do you want me to go back? Ten years…Experience? No, TP, that was B2B member exchange, and I did all their instructional design and delivery, and I did that for about three years. I just moved around a lot.
Q6	How many years accumulatively do you estimate you have worked in design/development for WBI?
A6	Eight years
Q7	In those WBI projects, how many years accumulatively do you estimate you have served as a lead instruction designer/developer?
A7	Eight. To be honest, up to six weeks ago, I have always been team member one.
Q8a	What's the major of your bachelor's degree?
A8a	I have a bachelor's degree in biology
Q8b	Did you have postgraduate education: Master's, or Ph.D.?
A8b	I have a Master's degree in Training and Development with emphasis in Instructional Design.
Q8c	Have you had any other training on instructional design?
A8c	Random certificate courses, in-depth learning. you know, took a certificate based course, Captivate course, stuff like that. I can't tell you all that. I went to courses and workshops all the time.
Q9	What's the business nature of your current organization: business/industry, education, government/military, health care, independent, other?
A9	Manufactory (business/industry)
Q10	What's the estimated size of the organization you are working for?
A10	They keep growing, I would say about 5,000 employees. It is global. It is five people in the training group, including the training manager and coordinator.

Q11 Can you tell me a Web Based Instruction project you are very proud of or got highly recognized?

A11 I would have to pick, first, the inception of an eLearning program at XXXX. They brought me in specifically to take their paper instruction methodology and move it to online. I had to redo it from the ground up. The last time the paper based materials were updated was 2004.It was very old and challenging.

Q11a How many team members in the project?

A11a It varied from module to module. I would say, at any given time, three to eight people per module. It could be legal. It could have been a product SME. It could have been an operation SME. That's a hard question to answer. At any given point in time it could have been anyone. Just me as the designer and developer. That would be the reason why I left the company. They burned me out. I got real tired. I did everything, voiceovers, everything.

Q11b How long did it last?

A11b Just the crew training… that could probably 14 months.

Q11c What was the project about? Was it about how to complete a step, process, use systems, or how to perform physical jobs, or change attitude/value?

A11c It's everything. It was on boarding. It was knowledge skills and attitudes. For example, knowledge---what products we sell, skills---how you make a pizza, attitudes--- how you deliver effective customer service. We had twenty-five modules. They are not synchronized

Q11di Describe the project in a very high level (the process by stages)

A11di I giggle because of some background. I came onto a team that didn't understand process and levels and project management. In the beginning it was an analysis of the entire role from start to finish in deciding the high level topics, and then picking them in order of need to the business at the time, developing in that manner. Then I would take a particular content grouping and say, "Okay, I'm working on this for the next three weeks." Then breaking it down into its individual parts and developing it. For me and for the timeframe, I had really extremely tight timeframes and there was not a great awareness of what the process should entail. Literally, content gathering, storyboarding and development sort of all mashed into one. I would open up Captivate and just start there. Launching was my job. On the technical side, they were never interested in evaluation. We did build evaluation, but XXXX does not have an LMS and the other caveat to this would be that I was building operations training for franchisees. You cannot force a franchise to deliver the training. I development materials for it and hoped people used them. In fact, honestly, the courses themselves were optional. In essence, everything – because of the franchisee agreement – everything is optional for training. Models are a funny thing. There are the six breakthrough steps of learning and ADDIE and Dicken and Gary and Smith, they are all the same thing. They are all basically ADDIE adjusted around. Probably, if I was to pick a model – and I can't pronounce his name correctly – Rapid learning development, I can't pronounce his name. I probably would follow that. It mostly is about what you can subtract from the process and still provide a quality result. In the inception of this particular project I did build a template.

That template followed me the whole way through. There were never any navigation changes or anything like that. It was basically decided for ease, expediency and not to confuse our end users. After I developed a particular content grouping I would present that in a live review, because no one would read my storyboards. No one reads those things. I would force them, "We're sitting down today and we're going through it." They would pick things apart and they would approve the scripts and the graphics, and then I would apply the backend programming, have one more technical review, throw it at legal if I needed to, and then push it out. Literally, I was developing 15 minutes of instruction over the course of two weeks. It was very quick. For example, how to make a pizza, I broke it down into three different groups, so topping and saucing. The dough module had to go to the dough people and the people who only deal with dough and make sure that criteria is correct, if people on my team were available – but that was always a hit or miss – the product quality individual and maybe on occasion the director of training. The project manager did the review. That did not always hold true at the point of review. We did try to plan it, but sometimes that doesn't always work out. It was like, "Hey you, come here. Sit down and review this. Thanks." Honestly, the best way to describe this review process – granted, if it was peer reviewed or SME reviewed, yes. But the real review happens from the users. Honestly, even the SMEs at that level – and this may be a XXXX specific thing – but they didn't always know the actual process or the actual details. We would find out when it was live and in the field and being tested by users, they would be like, "Why isn't this in there?" And I'm like, "Okay, why isn't this in there? You were supposed to tell me." Honestly, I almost – in rapid development and if you are following the cult of done – that's actually a really neat way of making it happen. You don't need perfection. You don't. If you are trying to get information out quickly, timely and at the point of need, put it out there. If it's not perfect with eLearning – honestly, with me being able to upload courses as I saw fit. I could make a change in 30 seconds and throw it back out there. It was depending – because they had nothing. When I came they were like, "We don't care what it takes, just get it out, get it out." I said, "Okay, what's the most important thing right now that you are concerned about," and that's how we decided priority. It involves such a frustrating process. I'm not going to say that this was the right way to go. Fast paced environment, we are talking – my function wasn't to serve the training department, it was to serve the end user. For example, I would talk to one individual and I say, "Hold your hands like this," and the other guy was like, "No, hold your hands like this." I was like, "Look, I need one way. Just one way and we will prescribe that to be XXXX way." Getting the egos, that be, to decide on that was extremely difficult. It came down to unfortunately involving the director of training. I would be like, "All right, S, they are arguing. Pick one because I have to move. We have to keep going." There wasn't time to deliberate these things. So between having somebody put their foot down or just knowing that, "Well, this could possibly not be correct, but we are going to put it out there anyway and hope for the best." A master

performer wasn't convenient. A master performer could be a five start store in San Diego. There was no way to get to those, not efficiently and not at a low cost. The XXXX structure is to promote from within, so a lot of the people that are holding mid level to upper level management positions were drivers and pizza makers. We would go to them. Then somebody would argue and then I would go to my boss and say, "Make a decision, please." I made pizza. I did that too. That is corporate requirement that you spend a week being a driver or a CSR. I did that. Any time I wanted to there was an actual kitchen in the building, if I had a question about something I would wonder down there and say, "Okay, if I tried this with my hands..." My own experiential process had to factor into it. The way that we delivered the final product was to use a social collaborative website, not necessarily an LMS. It's sort of like SharePoint, something called like Light Ray. I would put the course out there and they are able to comment on it, with each course page at the bottom of it was my phone number and my email address. I invited all 5,000 stores. If you see something wrong or you don't like it let me know, and they did. We got countless comments. I don't know how to quantify that. "I like it. I don't like it. This is wrong. This is right. That's great. Can you do this? Can we change this?" I mean it was continuous. In a structured environment – which no longer exists, by the way – I would like to sit down and given them a form and make PowerPoint presentations and Excel spreadsheets off of it. The nice thing about XXXX aside from the workload obviously, was that it was a true – it circled that informal learning process. They took the courses, my users, and then they would deliberate and talk about it and comment on it and then train each other. If one guy said I didn't understand that another guy would pipe in, and I would learn something from them. It was constantly cycling. It was really awesome. They didn't care documents. They didn't do it. It has never happened.

Q11dii Describe the project in as much low level (steps, tasks) as possible

A11dii So for a particular content group – so I will go back to dough. We called it dough usage and evaluation. I would first take time to gather all of the old materials together, write some sort of casual outline, "Okay, this sounds like it goes here, here, here and here." During that time with all of that I'm picking graphics at the same time. I'm like, "I need this. I need that. Qualifying the information to people, is that really correct? Do we want to put that in?" I would come up with sort of a draft. But only in Captivate, never in PowerPoint first, never in Word first. Let me correct myself a little bit. When I walked in – don't laugh or freak out – I said, "All right, what's our process? When do we write objectives? How do we evaluate them?" All the normal standard questions and she was like, "We don't write objectives. We just write training." I fell over in my chair. I was the first formal instructional developer that they had ever – oh, I think I lost you. I think on the WebEx I lost you, but that's okay. So I tried it their way for the first part of it. I was like, "All right, so if you just kind of mish mash it together. I will give it a shot." I hated it. I did, I hated it from a quality standpoint and an organized, for the end user, cognitive, junking, all the neat things that we do are

instructional developers, none of that was ever applied. So I put on the breaks like halfway through, I pulled my boss aside and said, "I can't do this anymore. From a professional level, I can't say I'm proud of any of this. Two, I can't tell you that it's working or if it would work or continue to work. I'm just developing these learning tissues, ZZZZ, it's crap." So I was like, "Okay, this is what we're going to do. We're going to sit down and I will write the objectives." I went through – and I don't know what they are teaching people in colleges and universities – but I went terminal, main steps, subordinate and "This is my end result. Tell me at least you want them to be able to evaluate dough so that the customer gets a quality product every time. Great, that's what you want me to do." Fine. So I started out more towards the end writing a document of objectives and from that gathering all of the content that would support those objectives, throwing it into Captivate, all the while taking my own pictures, taking my own video, whatever it needed to be done, stripping it out of DVDs that existed in the past. We didn't have time to hire a video crew and shoot it beautifully, and that was never the intension. Once I would get a rough draft of kind of how I wanted it in Captivate, we would do a preliminary review with whoever we could get, "Is it right? Is it okay?" I mean that's how we started to go to completion. I would get through a peer review of some sort, depending on the day. I would finalize all the graphics and the script. I would try to attempt to get them to sign off final on the script, because I'm like, "Look, to do voiceovers again and switch a word is complicated. That's the hard part." So after I got that signed off I would sit down and I would do the voiceovers. I've got a great voiceover voice. So I would all that, do all the timing, do any extra programming if there was a quiz or like a scenario based on decisions or something like that, if there was some back end coding. I would do all of that, publish a technical release and send it out to random people. I was always trying to get somebody new because I needed fresh eyes. "Sit down, take this, and tell me technically what's wrong with it. Does this button not click forward? Does this exercise not work? Does this animation crash your machine, what?" After that was done I would really sit to whatever SME or stakeholder was involved at that point. They would come back to me with their comments and then I would push it out. Sometimes those last three steps would happen over the course of two days or three days. I don't advise it. It's not something I would recommend. There are drawbacks. There is a perception from your end users, which we were always battling. The YouTube culture and the Buzz feed culture is out there, and it doesn't matter if it is completely correct. There is still a perception of it should be perfect, so it's always fast between, "I got to get it out. It may not be completely quality. It may not work all that well. Hey, you know, my boss approved it. Get it out there." Oh, my boss said so. They did get easier over time. There was that learning curve coming in. I needed to understand the industry and understand the vernacular because they have their own way of talking. There were always lessons learned from one to the other. By the end, I'm pushing stuff out quickly. They would come to

me, "Oh, we changed this one thing." I'm all right, click, click, click, push. We're done.

Q11diii What event/communication marked the beginning of the project?

A11diii First day, they brought me and said, "This is your project." I said, "Awesome." That's literally, again, not what I recommend. They put a supply chain manager in the operations training management role. Then she did some extensive interviewing and couldn't find anybody, found me and basically said, "Please come work for me." Initiation is an interesting word to describe it. I mean the project is always there. Training new people, training CSRs, is an ongoing and never ending infinite project. It's just, how are you going to approach it at any given point in time. Now they said, "We want to do an eLearning," but that's all they really had decided. "We want eLearning." But find an instructional designer, it was picking one off a tree. They did books and they stopped developing them in 2004. They trained exclusively through the book. The process was, "I'm a new CSR. I get my hat and my T shirt that first day." And they hand me this book with a CD and I'm supposed to listen to it and there are pauses in the instruction where the manager was supposed to go with them and coach them on whatever they had learned. That process devolved very quickly after they released it. People were not training their associates any which way they saw best fit. The interesting thing about franchises is sometimes they are big. There is one guy who owns all the XXXX in Texas. Or sometimes they are small, there is one guy who ones in Trevor City, Michigan. They can choose to train however they want. The guy in Texas builds his own LMS, shot all his own videos and trained his people that way. See I told you, you were going to laugh!

Q11div What event/communication indicated the completion of the project?

A11div The project was based on a certain section of the business which would just be the frontline operations, CSRs and drivers. No special events. Well basically, I quit. I was like, "I'm done. It's done." Get somebody else to do this. There is a job opening at XXXX, by the way, if you want it.

Q11dv What was your role in the project?

A11dv Honestly, over the years – and this is something that my colleagues now and I were talking about. They looked to me for a year and a half. They had an open position for a year and a half. They were looking for a specific sort of person. They were like, "Why can't we find this unicorn," that's what I call it. The reason why I got my Master's degree – I was designing instruction back in the day,but then I saw over time that all the job postings were demanding it. Then I got down to the last four candidates at a particular job, and they said, "Well, you don't have any adult learning experience," as far as all the textbook type things. They said, "You don't have a Master's degree so we are not going with you." I was like, "All right, that's it. I got to go back to school. I did that at 32 years old. It wasn't the worst thing I ever did. I actually really enjoyed school. I think maybe someday when I'm older I might go back again for a different Master's. Right now I have to pay everything off. The thing I notice is that the instructional designer position at companies – not contracts, but at companies – typically want you to know graphic design, you have to

know Flash, you have to know Share Point, delivery systems, LMSs, voiceovers, videographer, all of it. You have to know all of it and then be willing to learn other things on top of it, plus the performance improvement philosophies and approaches. It isn't just, "Hey, I play in PowerPoint," that's not it. That's not it anymore. I mean honestly, it was like, "We got to get it done. Who is going to do it?" We would just do it. There were times that if there were old videos that were professionally shot or all the old CDs, the audio clips, if I could – because I honestly can't stand the sound of my own voice now. I could care less to ever hear myself speak because of just hours of audio that I produced for them. If I could get somebody else or get it from a different source, repurpose something, it was always infinitely quicker to do that. So I can concentrate. You know what my part in the project really truly was – it wasn't about developing and it wasn't about this particular project or just my role at XXXXX – it was more to guide them to a more validated process, to a more structured, formalized, stable process. I never entirely got there. We fought. It was a very contentious relationship. Because I was like, "Look, this is not right. This will not give you things that have longevity and can be repurposed. You are setting yourselves up for failure." They didn't necessarily want to hear that. But I tried. I really did try. I hope the next person that takes that job I wish them all the luck. Honestly, the company itself – and this is really important for any serious designer or developer or professional or whatever – they got to want it. They really have to want it. If they don't want it, the company that they are working for, you can take all this love that you have for the profession you do and kill it. Honestly, I was actually asked to design crap, just horrible, baseless, ineffectual instruction. And I knew it. When I found my present position, they asked me why I was leaving. Because I get paid a decent amount of money and I get access to all these toys. I do whatever I want, which is really nice. If I ask for it they give it to me. It was fun. It was pizza. At least I got pizza every day, right? But on a professional edification level where you invest all this time in educating yourself and continuous improvement in your own skill set, and when they just don't care and they're like, "Just put it out." Taking a paycheck – I had the luxury of not having just to take a paycheck. I do have that. So I made a choice. Exactly, I want to have impact.

Q11dvi What software and services were used?

A11dvi Okay, eLearning suite, Adobe eLearning suite, Photoshop, Captivate, Audition, Flash, Bridge, which is kind of silly, Dreamweaver. That's probably it for the suite because the rest of it is kind of crazy, and Adobe Premier Pro, which is the video software. Other things, I grab whatever I need. There was some PowerPoint depending on if I needed an X or if I need a background. It was quicker to develop it in PowerPoint than it is to open up Photoshop or Illustrator, whatever, and make something, grab some screen prints. I did use Microsoft Project on my own to organize myself, Microsoft Word, Microsoft Excel. If I wanted to create a table it was easier to copy it over from Excel. Oh, Adobe Acrobat Pro, because there were written materials to go along with some of this stuff. I did the project design for

myself. Not required at all. No LMS. It was hosted on a content management system called Life Ray, and it's basically just like web pages but with the social media engine on the backside. So they could do discussion groups and things like that, which I think most companies are moving to. I think LMS are on the way up.

Q11dvii What hardware and devices were used?

A11dvii Oh my god. My laptop was – because I used a laptop so I could run around with. That was basic level, 64 bit Windows system with 8 GB memory in it. I had a Sony high definition video camera. I don't remember the model number. I had a Snowball blue microphone, which I loved. I also moved to the Yeti which is also very nice. I built my own portable sound booth. They are very easy. Yeah, it's super easy. It is a nice addition to have when you are trying to record anywhere. I would be recording in conference rooms and in copy rooms, wherever I could find a quiet spot. I did use my DSLR. I had a Cannon XT. At times, I've used I Phone video and regular Smartphone pictures to produce content. Half of those materials were my own possessions. I don't want to sound bitter because that's not how I am. I did it. I made whatever impact I could and I left. I don't think they knew what they had in me. I don't think they understood how much money they saved and what those turnaround times really mean, and with that turnaround the time the quality that they got for it. I don't think they understood that. It's only been a couple of weeks and I've already had the port intern that sat there with me has called me on a couple of occasions. I was like, "I'll help you, but I can't help you a lot because then you should be paying me again." That's how that works out in the real world. I bought all my own books, if I wanted to do research. That type of stuff was mine. Professional memberships, fifty-fifty split.

Q11e What were the outstanding features of this project?

A11e Since good is a relative term, what made this project good for me was I did get to do everything. There was a high exposure to acquiring new skill sets, which was for me I really have no barriers. I'm like, "Cool, that's new. Let's do it." There was also my own – since they had no clue. I got to be as creative as I wanted to be. There really was no, "We only want it to be a click forward," they didn't even know that. So branching and scenarios and decision trees… They had no clue. There was interference on a, "Why can't we just get it done," kind of thing. But when they left me to my own devices, "What are you doing now?" I'm like, "Yup, I'm working on those, see you later." I could do all these things. I would be like, "Hey, look at this animation I just did in Flash," and they're like, "Oh, that's so cool." Is it cool for me? I feel bad for them because they didn't know the horizons they could obtain, but whatever. High exposure to the project was a fairly visible one. The entire company had to touch it. On an exposure level, just at the high up kind of thing, on a C level there was a lot of exposure. But also with the more important people, the CSRs and the drivers that took my training, knowing that 5,000 stores times 10 to 20 people per store – thousands of people looked at my training. It went international. Right before I left we had the

international trainer's conference. I picked Captivate just for this reason because you can export the captions and re-import them translated. We were teaching them how to do it. With Captivate you can export the captions, re-import them, say, in French and save out the narration in the slides notes and then get that translated. Then there would be an added cost, because at that point, honestly, I was brave enough – I was like, "Look, I'm just going to do the voiceovers. I will take a voiceover course, teach myself how to do this, it's not that hard. There are not many people brave enough or talented enough. There is a certain level of talent to be able to do something like that. You do have to act in a way. Yeah like, "I can't do the voiceovers." I was like, "Yes you can. You can." I did do some online reading and I talked to a voiceover artist that lives in An Arbor. I took a lot of tips and tricks from her. I learned some things. I would like to actually do it on the side, but it costs some money to get started. It's funny that you mention it that I had to do research. I don't know if I'm just weird – I am weird. I don't ever shut off. I came home last night and I wrote scenarios for fun. I started building an online module to learn how to bartend because I was just bored. It's fun for me. I get to practice interactions or programming or applications of certain technologies. Because I'm not using it at work doesn't mean I can't play with it on my own. So I'm kind of weird, I admit that. See it's funny, because I have been so active, I reach out a lot. I'm like, "I want to talk to the people that are like me." But when you are involved so much with people who aren't like you, like XXX or MMMM, I was the only one. They were like, "Yeah." I am on a great team now, an excellent team now. There is an open position too.

Q11f Did it occur to you that you wish to have done the project differently?

A11f Oh yeah. I would have liked to have had the opportunity to put measurable with it, so I could prove to people that my instructions worked and it did do what we said it was going to do. Halfway through the project it almost entirely was derailed, because from the C level came down to the comment that we don't think eLearning works. That was a very bad day for me. I'm like, "Well, I know that you think it doesn't work but you haven't given me the infrastructure nor the resources to help you realize that it does work or that these things are actually productive. That was kind of a disappointment for me in that respect. I wish I could have just done it without really the sanctioning of the people, of my stakeholders, and just been able to produce a report. But then again the separation from my end users was extremely difficult. I rarely got to talk to users, like go and see them perform and do the analysis what it would require actually. To have the one time, because just like you just heard, I would be finishing up one and starting another. There was never a break. And two, it is franchisees. They have to let you come in. When I walked into a XXXX and told them who I was, these poor people would freak out. Because there is another group called the operations evaluation, basically patrol, who go and ding them and mark them down in performance. So any time they heard somebody from corporate they basically would scatter like cockroaches when you turn the lights on. They would just disappear. "I'm sorry. I didn't mean to do that. Am I doing this

right?" Trying to analyze that is almost impossible. It is too bad. They could be so much better and so brilliant. Their position on a business viewpoint is very precarious. There are people out there that do it better. Even though there are all these XXXX everywhere, most people just in general last about 75 years. That's kind of the longevity of any company. At the 75 year point, they either get dissolved or get absorbed into something else or completely change. XXXX is 50 years old. So it is a kind of a weird thing. They are stuck in an old environment mindset with a new world – that in itself is interesting from a performance improvement standpoint.

Q11g What were the solution(s) to the challenge(s)?

A11g I refused to start the next project unless we sat down and talked about all the important parts of approaching something like this. Because the next part was general managers, and with that was a certification quote process. I'm like, "If we're going to go through a certification, we need objectives. We need to analysis entry behaviors and exit behaviors and map it all out and list all the tasks and put measurements, because I can't write evaluation without a goal." I can't do it. I can, but it's fluffy and stupid. So I refused to start the project, which again I have the luxury of doing that. I can go to my boss and say, "No, I'm not doing it." I don't recommend that for everybody. You will get fired. I probably almost got fired at that point. But the director said, "Why are you refusing to do this project," and I explained to him, "I can't in good conscious create a certification program that people depend on for raises and promotions without having a sound formation. I won't do it." So we brought everybody in a room. All the C level people that were involved in it and all the higher level SMEs, which would be like directors and VPs and things like that. I went, "All right, this is what I'm doing, terminal objectives for each level. I need it broken down into levels and why are you breaking it down into levels, and what is the expectation of them walking in? Where should their skill set be? What numbers are they supposed to be producing?" Four hours later I had eight people that were shell shocked. They were like, "I didn't realize it involved all of this." I'm like, "Yes, and we're not even near being done." But again, little tiny incremental impact on the process that XXXX followed or tries to do to create these things. Because if I let them have their way, they would have sat down, opened up PowerPoint and started throwing graphics and words in there and said, "Yeah, this is our class." Not unusual from a private company standpoint. Again, you have to have a place that wants it and a group that wants it. They never did. I felt bad. I was looking for a new job, but I wasn't doing it whole heartedly. Honestly, I did have some perks of making my own schedule and working from home when I wanted to and things like that. But then this beautiful thing crossed my path. I walked in and put my two weeks in and they were like, "Can we do anything?" I was like, "Absolutely not. I'm done."

Q12a What specific knowledge, concepts, and ideas that helped you?

A12a I'm big on experiential learning, big on scenario based approaches, telling a story especially with – I'm looking at 16- to 25-year old eighth grade reading

level, more visual, less text, kind of simplified – I don't know if there is a word for that or philosophy or approach designated for that.

Q12b What soft skills did you use?

A12b I can honestly say my soft skills skill set is fairly weak. Coming from an IT background, too, I'm a little bit abrupt. I don't even know how to answer that question. I'm not going to say that every day was peachy. There were times when I looked at my boss and said, "You know what? I'm going to work for the rest of the day at home," because we would literally fight at times. She was like, "I don't understand why you don't just do it this way." I'm like, "Because it's wrong. Here are three research papers, a book, and a website telling you that it's wrong." As far as soft skills that I developed for, all basically customer service and up selling type things. You got to smile. Oddly enough, I have to train people to do that. Yeah, we smile. Smile when you talk on the phone. Here is another challenge. They are paying people minimum wage or less plus tips. You can't get people to work for you. So you get people that maybe don't have the best social skills. You have to tell people to take showers at times. "No, you need to comb your hair. Yes you do. You have to be nice to people." There was a way to walk into XXXX and videotape them, so we would have candid video to explain this is a bad opening, this is a good opening, etc. When you walk into a XXXX you are supposed to say, "Welcome to XXXX" within nine seconds. To get that culture change to happen, that was a new thing. It took forever, and it still doesn't happen. Up selling, definitely, that's a soft skill. I use it more now than I did at XXXX, but convincing people – or being able to explain the time it takes. Literally I have heard this so many times, "Can't you just take PowerPoint and dump it into Captivate and be done?" "No." It takes time to be creative. It takes time to gather content and evaluate it and make sure it is accurate, all those neat things. So explaining that process and enforcing it, and enforcing it in a way that I drop off storyboards or printed material for people, "Okay, so did you look at it? Okay, so you committed to Friday, right? Okay, so it's Friday. I need that from you today," sort of thing and trying to impress upon importance and priority and urgency. I guess that is a soft skill. Occasionally I am good at convincing people. I definitely have a little bit more success with my own people, by that I mean technical or tech or computer people or something like that. Everybody's got their own timelines and their own pressures and things like that, and trying to convince that if they help me it will help them. That part sometimes is a little bit opaque. I like to help others. I like helping people like you though. Just in general, I have done this once before with a graduate. To get people to really understand what the real world is like. Because I have been with some graduates and I'm like, "Yeah, it's just like that. It really is." You know, if you are going to be a designer or a developer of one and you're a team of one, you really have to wear that hat that's going to get you certain things in the door with certain levels of the organization. So there is a certain degree of professionalism and managerial skills that you do need to have. I don't necessarily have them all. I admit that.

Q12c What hard skills did you use?

A12c Yeah, I'm a geek. Oh yeah. For that project, writing is not really. Get the words on the page, get the words set. Make sure they are in the right order, that's about it. I have dabbled in everything. There were some things, I have edited video before but I did teach myself Adobe Premier for this project because I wanted to do more advance things. I did teach myself a little bit more in action script, to be able to do some things. There is always something that you just don't know. I used Flash very rarely, one or two things. I did all my own CSS, a little tiny baby bit of JavaScript. I'm not good at it. There are other people. Audio, I tried to start out with the best take that you can, which would mean decent mic, a reasonably well proved script and some degree of trying to get other people to do that, coaching them on the right way to speak and timing and inflection and things like that. I told this one girl that she needed to act like she had smoked a joint, which is a horrible thing to say to somebody, but she talks so fast and she talks so high. I'm like, "L, take it down a notch. Act like you had a glass of wine and you are sitting around with your friends." She got all tense when she started to do voiceovers. I never really got her to a place – but start out with the best, first take that you can, because you can do a lot of things with it. And do deliberate pauses, very deliberate, "Welcome to XXXX" pauses. "This online module gives you the information you will need to", blah, blah, blah. That way you can take out full sentences very easily.

Q12d What attitude did you realize that was helpful for the success of this project?

A12d I would probably say that at one point I have to let my ego about the perfection level that I wanted to get. I had to let that go. I literally had to say to myself, "I need to stop caring so much." That was impediment to the project. There can be too much instructional design. We would all love to do textbook and beautiful and perfect and have it so prettily documented and signoffs. I would love to have all those elements. Yeah, that's not going to happen. Be able to quickly refocus. I would work on one thing and I would be asked to stop it and start working on something else immediately, fast turnaround and refocusing all the time. There isn't the luxury of finishing linearly. If there was a linear word for what that type of multitasking is, that would be needed to come up with. It's something bigger than that.

Q13 Which year was the project? What do you wish to have known that you didn't know back then?

A13 Oh, 2004 was the last time that projected was updated, the last time the instruction was updated. When I walked in 2009 they said, "Here." Their impression was – bless their hearts – "You can just take this and put it online." I went, "What?" No, we have to start from the very beginning because there is so much that has changed." Because the thing that they put us through was pizza prep school, I got to take that about a month and a half in. I actually started on the first module. They wanted a glossy piece for their 50-year anniversary party. I started in May and it needed to be done by July. I started working immediately on that and in about another month I went to something called pizza prep school. I realized what they were telling me was correct and

what were really correct were two different things. I wished I had asked better questions before I had started or even accepted the job. If I would have known some of the things I might not have said yes to that. I am a little bit savvier now, as far as that's concerned. As far as specifically the project, I wish I would have known who really was the boss of things. That was never really illustrated. There were so many people who thought they were the boss of it. I was pulled in a lot of different directions. If I had ever just said, "You are the ruler of this world," that would have greatly helped the whole situation, if that could have been defined before I even put mouse to screen. You know, there are a lot of different things that – I would love to talk about just instructional design, but there is a whole environment which exists and is impacted by the culture of the business. That culture was a hot mess, a lot of napoleons but no army. I was the one who jump ship. On another sort of off tangent – there was another girl that worked designing POS type tings. Her title was the instructional designer but we worked not even closely related to each other. She quit too. Usually, at this point if you are of a certain demographic of 25-35 you lasted about two years at XXXX. I still have friends in the office and I still go to the workout place. There is a gym in the basement. I don't have a lot of interaction with my direct colleagues. It was slightly contentious. They brought me in. They were excited to have a formally trained instructional designer, but it's like buying an Arabian stallion and wanting it to pull a little cart. I'm like, "You have no idea what to do with me." Then when I would suggest things they would go, "Oh, we don't do things like that here. That is too formal. You are too organized," I had that one. I'm like, "Are you kidding me? I got to go find my own unicorn heard." And I did, I found a great place to work.

Q14 What are the other knowledge, skills or attitude which was not used in the above project but you used in other Web Based Instruction projects you led?

A14 Articulate Suite. I think it's called studio actually. Articulate, Quiz Maker, Engage. Now I get to be a little bit more formalized. I get to need the needs analysis. I'm more concerned about metrics and formalized approaches towards eLearning and Web Based Instruction. It would be reduction in errors, things like that. I have aptitude to actually obtain data about my projects and then be able to analyze it. There are methodologies and structure in place to talk to the learners. It's a definitely a more structured environment. Usage, rates, position, location, they don't test yet either. This company I work for now has just started. It's kind of the same experience without all the barriers. They have just implemented the use of Skill Soft and are porting over some of their instruction education courses to corresponding material that already exists. So we have level one data, but no more than that.

Q15 Assuming you are hiring a person as a beginning instructional designer in Web Based Instruction, what skills are you expecting?

A15 More than what I see now. I want them to have a basic technical skills set in graphic design and at least one authoring software package. I don't care which, although the preference in the industry seems to be Articulate, some web development. They would at least know how to read HTML. Oh, and

social media. You have to be a social media baby. There is too much potential at this point not to at least have a Twitter feed. You need to know these things. Some sort of performance improvement theory background and what it takes to take a request from the business and see it through to a measurable result and know that process. The rest is just gravy. I would never ask anybody to know all of the crap I know. It's too hard. To make another me in this world I would have to find an insane person. If we are talking about a level one specialist, no management skills per se. I would say basic level of communication – well, you have to be able to converse on a high verbal level so you can go investigative interviewing and things like that. Be able to guide people in the right direction. For example, SMEs are like herding cats. Be able to talk and communicate in a variety medium, so can you communicate visually? Can you communicate with video? Can you do those things and be able to convey ideas and concepts? If I found somebody – if I was a hiring manager right now and I was doing the XXXX project, I wouldn't hire a beginner. If I had a team of people in place and I had an opening for somebody to do production on a basic level – like I already have storyboards and the concepts down and things like that – I would bring on a new graduate. That way you can help them grow. I don't think any recent graduate would have 30 percent of those skill sets. It would be impossible. I think the reason why – I'm a biologist who is an IT person who went into training and then went into instructional design. There is a pattern of growth there.

Q16 Assuming you are hiring a person as an experienced instructional designer in Web Based Instruction, what skills are you expecting?

A16 LMS or other content delivery platform experience, audio, video, and graphic design on a higher level or expertise in one of those areas, and the other two can lag, a solid foundation in performance improvement, measureable, "I did this and I did that, I can do a level on through three Kirkpatrick deal," and be able to articulate well on what that actually means, project management skills and probably the beginning of management skills. You would want to be able to promote them to a head of a team.

Q17 Which direction do you see Web Based Instruction is heading to?

A17 I see it going to less of the traditional, "This is a welcome slide, this is a branching slide," you know. The timelines are shorter. The content is less stable. Rather than having these – because the thing I'm producing today, right now, its expiration for validity could be six months. The production values are going to go down-ish. What I mean by that is we can produce these glossy things with very little tools. I think it's more about being able to show your results than the actual product. But also being able to do all these fancy high tech things like informal learning and being able to drive that through social media.

Q18 What do you think an instructional designer should do in order to keep up with this direction?

A18 I think we already touched on it. I think there are two classifications than instructional developers or designers or whatever you want to call it. There

are the ones that just do it and they get their paycheck and they go home. They are quickly becoming obsolete. We, for example, are trying to contract out a particular project right now, and the developer can't realize what we're trying to get them to do. Her skill set is so narrow. But then there are the other ones that we already talked about, the weird ones that are constantly reading, blogging, going to conferences, incorporating old and new and mashing it up, and not looking at the boundaries but looking for the solutions. That type of instructional designer, which I don't know if that really is an instructional designer anymore. I don't even like to call myself an instructional designer anymore. I didn't get to pick my title. I'm like, "I'm an eLearning goddess, what are you talking about?" It's all about performance improvement. If I do that through instruction or a job aid or simply moving widget from point A to point B, we need to be internal business consultants.

Q19 Anything else that was not covered in our conversation but you think is important?

A19 If I was to give advice to a new graduate or to somebody who says they want to be in this very, very strange and exhilarating profession or be in this profession, I think – there is a balance to this particular response by the way – but we really need to as a collective hold ourselves accountable to what this really means. It's about creating things that have impact. If you are asked to do something else, really position yourself in a way that you can guide somebody not to do that. All we do is undervalue what we do. Training departments and learning departments get asked all the time. Ebbs and flows with the economy, the economy goes up and they invest more in training, but they don't realize it really should be the reverse. If we can as a collective professional industry be able to constantly report on our results, we wouldn't be in such precarious position all the time.

Transcription of Interview 016

Q1	Good Afternoon, thanks for taking time with me. Can you tell me your current job title?
A1	I am the program director.
Q2	How long have you been working in the current position?
A2	I have been in this position for approximately 6 months.
Q3	What's your age range: 25-35, 36-45, 46-55, and 56 above?
A3	46-65
Q4	Would you say you are actively involved in instructional design?
A4	Yes, I am.
Q5	Are there any other positions have you held before, that were related with instructional design?
A5	Yes, prior to joining YYY which is my current employment I worked for NNNNN Professional Services and in that capacity, I work as the Sr. Development manager as well as lead, instructional designer, project lead, as well as a designer, all at NNNNNN and I was there for about 6 ½ years. Worked for W…row College, I was the director of educational technology and professor in the education department teaching instructional design and educational technology courses for 2 years.
Q6	How many years accumulatively do you estimate you have worked in design/development for WBI?
A6	Before that I worked in banking as a member of senior management at Cxxx Bank as a manager, and was training manager for Cxxx bank, and in that capacity I was responsible for managing a state of the art credit training corporate training, corporate U. Worked at bank for over 20 years, but I only worked training for 5-5 ½ years. At NNNNN professional services, starting in 2004, about 7 years.
Q7	In those WBI projects, how many years accumulatively do you estimate have served as a lead instruction designer/developer?
A7	Lead or manager? Lead of instructional design, maybe in NNNNNN, as leader – maybe 4.
Q8a	What's the major of your bachelor's degree
A8a	I have a bachelor of science degree in Business Administration.,
Q8b	Did you have postgraduate education: Master's, or Ph.D.?(What's the major?)
A8b	MBA in finance and PhD in instructional Technology.
Q8c	Have you had any other training on instructional design?
A8c	No other training in instructional design. I am professional, constantly engaged in online seminars, workshops, professional development, conferences, speaker, I present, I attend. I can chronological those for you. I do it every year.
Q9	What's the business nature of your current organization: business/industry, education, government/military, health care, independent, other?
A9	Educational Technology consultant,
Q10	What's the estimated size of the organization you are working for?
A10	Small firm, less than 10

Q11 Can you tell me a Web Based Instruction project you are very proud of or got highly recognized?

A11 I can think of several. Does it matter about size, or how recent? From 2009-2010 I worked an international assignment in London, England and I was the lead instructional designer. Later became the development manager for a web-based project, was with MOD, Ministry of Defense, equivalent to Department of Defense in US, were converting nonmilitary professional training from instructional to web based development.

Q11a How many team members in the project?

A11a Over 100 team members. This is a number not specifically about SME and it includes all personnel that worked for NNNNNNN that were responsible for analysis, design, and ultimately development of web based courseware. It was a huge project, it is over 275 hours of online web based courses for 3 different branches of the Ministry of Defense – Navy, Air Force, and Army.

Q11b How long did it last?

A11b The project is ongoing. I was involved for initial launch and start up phase for 1st year. In England, go over, hire personnel, train the personnel in England, get project up and going, build capacity in England, so that UK could continue to service the customer.

Q11c What was the project about, was it about process, about knowledge, about values, what about the content, what content is it?

A11c All of the above. We did almost 300 hours of courseware; when you do a curriculum broken into 10 different curriculums. In the Air Force, when you are teaching people about maintaining airplanes and how to fly airplanes, you are covering values, knowledge, skills. You are covering all, it wasn't just one course, it was a curriculum. The 275 hours of web-based coursework; on average a course was 20-35 minutes, so over 400 courses. I didn't develop all of those, what I did was a lead in the analysis of courses for the navy and then after switched over to development manager and provided managerial support for courseware design and development, so again these courses were still being developed, I was only involved with training, hiring, training, and developing people to complete this project.

Q11di Describe the project in a very high level (the process by stages)

A11di It was a government contract, NNNNNNN, my employer partnered with 5-6 different companies, put together a proposal, went through the R and Q process and were awarded multi year, multi billion dollar contract that is primarily because expertise to do web based training and development on the scale didn't exist in the country or in government so they brought in private contractors to come in. The web based development project was part of a bigger project that had to do with total change and transformation and how training was being delivered to military in the UK, going from stand up, instructor lead training to a blended solution. As I said, this was first year of a multi year, it was a 10 year project – to go in, analyze the content, determine which content could build a curriculum, take curriculum and migrate to an LMS, develop training plans for different personnel, and then based off of the ultimate blended solution, put together a plan and strategy to developed and

designed web based aspect of a course. So in first year, we identified 10 curriculums spread across Army, Navy, and Air Force for phase one of project, and within those three curriculums identified 275 hours of web based content for development. So for each subsequent year based on analysis, different courses and curriculum would be selected and just continue to design and develop based off the process we put in place for them. Under the analysis completed up front, we put together a training plan, design development plan for each curriculum, identify what content should be delivered by what method of delivery, various methods of delivery, some was stand up, some was demo, some was OTJ on the job training, others are hands on, direct instruction, and some was various methods of degree, and some was web. The analysis was a process - provided the content to be covered, the objectives and all the requirements for the web. And based off that design the course was developed, assigned to an instructional designer/developer, and to go through rigorous review and approval of customer with their feedback and then all courses included audio, simple to advanced animation, and then delivered electronically. Customer is responsible for loading actual access onto their LMS and they were responsible for delivery. Our project was complete upon delivery of content. When the project is done with development, there were some evaluations. Course was loaded by client on their LMS and at the end of each course LMS is administered a Level 1 and a Level 2 assessment. So part of course development did include a level 2 assessment, what we call a course quiz. The course quiz included a minimum of 2 questions per objective. Depending on number of objectives in course, on average for a 30 minute course, most courses have 4-5 terminal/enabling objectives, so each course has minimum of 10 questions. Something from evaluations would be fed back to the course. Level 2 evaluations for the initial pilot courses, that information was fed back, looped back to team, if they wanted more animation, more audio, or so, yes, we did incorporate feedback from level 2 into our initial design and development and we also reviewed and gleaned information from Levels 1 as well. We didn't get those evaluation feedbacks ourselves, the client did share. We had weekly team meeting with client and client did share results with use, and we made adjustments accordingly. We absolutely followed the five phases of ADDIE model. Regarding each detailed step of this project, well, NNNNNNN was big on process, so we had a project plan that pretty much followed the ADDIE process, so early in the process we spent a lot of time educating the customer, bringing them on board to the process, so they would know what to expect, and how their expectations underpinning, and educating them on the requirements because a lot of customers do not understand that goes into a web course; how many subject matter experts we needed, when we needed them, how long it would take to complete the analysis, having access to the actual equipment and tools. If training was hands on or demo related, we also had to educate them on their role in terms of providing pictures, photos, taking up to date picture/photos, all the requirements. So up front we spent a lot of time on planning, resources, setting up calendars, schedules and so forth. I had a customer who had a full

understanding of the process requirement so there to give analysis. Every month, week we would go to the location and provide a presentation again on the specific people now we are working with, not the higher up managers, subject experts, training people, personnel whoever was assigned to us, we would train them, and then we put together a schedule, dates, times that we would be available, the subject matter experts would be available and complete the analysis. Everything was in the project plan, the project plan was broken down into tasks, dates, resources, and we would get buy in from the managers and leadership and upon completion of those specific tasks, sign off an approval, and we would role out the next month or the next few weeks. And that is how we proceeded through the project plan until complete. On average, it was taking us probably 4 to 6 weeks to complete the analysis, another 2-6 weeks to complete the design, and at every milestone we would receive customer feedback, review, approval and sign off on it. From there we moved into the approved design, the output from the analysis is what provided the foundation for the design phase. The output from the analysis was the specifications for the design phase analysis and were the specifications for the course development. The output from the design phase were the objectives, the content, much of the content, either subject or pre-procedures, references on sources of information, so the development on specifications, so you know if it was going to be level 1, level 2, level 3 again, no animation, simple animation, 3D, all the requirements. And I should say all the courses at the curriculum level. From there, given the requirements, then we would put together a new plan to govern development, and then the project plan would break the development process at a course level down into tasks, procedures, requiring customer sign off approval at each milestone all the way through to completion of course. What we call formative evaluation, we would do a demo or beta where they would go through the actual course, they would mark up the storyboard, make changes, and we put those changes in and they were reviewed again for final signoff, approval, and delivery. Timely wise, on average to do a 30 minute course it was probably taking 6 weeks, longer if a lot of feedback and changes were required. A number of revisions were accounted in that time needed. I am counting revisions. We would do a design document, customer sign off, and approval, that include a revision. Then we will do storyboard, customer sign off revision-approval, and then we would do a view of the web course, and then we would do a beta, and customer sign off, approval, including revisions, and then do delivery. So including all of those revisions, yes, 6 weeks. But often times, once the course was delivered, you had asked me about actual evaluations, the client would do a level 1, level 2 evaluation, often times and the course came back, and those changes were not included in the 6 weeks. So I would say 6-8 weeks for the normal design, development process from beginning to end. Personally as a lead, I was involved part of but not all. Initially when I went over to join the process, the first 4 months I was a lead, and I was involved in all the process only for certain curriculum, not all the curriculum. I had a team, and the team I provided leadership. I had different teams working all over the country in

different area, different subject matter experts, working on different courses within the curriculum at the same time, so I was putting together the schedule, leading the team with management, reviewing the presentations, the on boarding, providing leadership. I wasn't doing all of those design tasks but I was overseeing and managing team members to execute the tasks.

When I became the development manager I had team leads working under me, working with actual design and development, developers executing those tasks but I was managing and overseeing at that point development of multiple courses. Many times we had 3-4 curriculums in development at one time, and courses within each curriculum would be anywhere from 5-20 at one time, we had 100 people working on this project, so it was a very big experience. Again, the team leads were responsible for managing it down to the detail level. My role as development manager is primarily to keep the schedule moving, to make sure people were on schedule, completing their tasks on time, getting feedback from the customer so that we could just continue to report. Because, if you share a project plan and a schedule with a customer, and you say on this day you have to be available to review storyboards, then you have to make sure those storyboards are ready. As a manager I was kind of coordinating the schedule, managing the project, managing the resources to make sure we could meet the timelines that we had presented to the customer.

Sometimes I did review those storyboard design, sometimes not, I mean my leads were responsible for working with ISD, reviewing storyboards, reviewing and checking betas, but all the time particularly when we had some quality issues, and when we tracked those quality issues back to certain teams or certain IP's, many times I did review storyboards, designs, documents, or even attend betas, so I can't say that I did, but that was not my specific day to day job responsibilities. When I was a lead, I managed instructional designers, and I think the most I had reporting to me was 8, but that was not on this project. On this project, the designers did not report directly to me, they reported to leads, but probably at one time peaked at close to 50-60 designers. We had 2 Sr. instructional designers or leads, and under each of them they had two assistant leads, so 2-4-6. For those lead under my supervision, there were about anywhere from 6-10 instructional designers working for them. So that is why I say at any given time we had as many as from 40-60 ISDs.

We called ISD developer, so they are the same, they are both designer and developers. There were media people who do programming part. We had a graphic artist that provided support and graphical access. We had audio people that provided support for doing the narration, we also had 3D graphic artists that were advanced animation, and we also had a video specialist that could do short 30-40 sec video clip, and when needed we had some trained hands on, we also had an education….that supported us, when you do the broadcast and you sign in and do the online training, and you can show the talking heads the teacher along with the PowerPoint content. We also had a facilitator instructor, we also had another person, can't think what they are called the product, to do the different edit the format. In addition to developers and instructional designers, we had a host of instructional supporting people, about

10-15 people in that category. I had a professional project planner. So I didn't need to do the project plan. At NNNNNNN we had a professional program planner office, and we had professional program manager who generated the project plan, and would also provide a detailed breakout on the schedule, as I mentioned we updated the schedule every 4 -6 weeks. Now, that was for design and development. For analysis, I actually developed the project plan through the analysis phase, and work through schedules directly with clients. As a lead, at NNNNNNN on smaller projects, I was responsible for developing the project plan, but not on this large huge project I just described to you. When I was the direct lead, I put tasks, dates, resources to manage resources. The resources would be analysts, and the subject matter experts, and during design and development it was the instructional designer and the lead along with the customer who would sign off an approval so in some cases I was a direct manager and in others I was not. To determine who would do what job or tasks, it was a group effort, the program office actually had authority to make decisions over hiring and firing, but as a manager I certainly participated in the interview and selection process, and as a lead for the analysis phase I actually made the hiring decision recommendation for all the analysts.

Q11dii Describe the project in as much low level (steps, tasks) as possible

A11dii (Answered in A11 di)

Q11diii What event/communication marked the beginning of the project?

A11diii Sometimes it was part of my job to contact customer directly. We were in constant contact with customers and in most cases we had weekly progress reporting meetings. It was my job that indicated to train the customer on what to expect, it was my job to engage the customer in explain the project plan, and the buy in and approval of the project plan, and then also certainly was my job to provide project reports and presentations on a weekly or monthly basis. The leads that worked for me were responsible for day to day to day customer interaction. It was professional project managers in the professional management office kept tracking of the progress and the project plan was update weekly. Those leads have the primary responsibility for reporting status, have weekly status meetings to determine the team if on schedule, and if not on schedule we would re-plan and extend the date with customer approval to update the project plan. I was in more management roll. When the project was initiated, there were some milestones/events, such as kickoff meeting, on board or initial training, that's something repeats every time when have new SME or new personnel, repeat the whole process, also so whenever we hit milestone we would have celebrations, buy lunch, nothing major, bring in pizza, or extend congratulations or recognition to people that went beyond the call of duty to meet a deadline, a little intangible kind of thing.

Q11div What event/communication indicated the completion of the project?

A11div while I know when the project was completed. I actually came back to the States in Sept 2010 and at that point we were all the analysis was complete, and we were right about 50-60% complete on development and delivery, and so project continued until Spring, March-April 2011 and at that day I know

they didn't need it, and it was primarily because of the feedback from the level one evaluation, they had some re-dos. I want to say they finally wrapped it up June 2011, they went 90 days over. Actually it was pretty good. So they completed 100% of the analysis, 100% of the design, and it was the development that went over about 90 days. No celebration or award, or doesn't know because I had moved on, I'm sure they did, had some kind of dinner or something, but I had kind of moved on to another project by then.

Q11dv What was your role in the project?

A11dv (Answered above)

Q11dvi What software and services were used?

A11dvi It was all in-house development, and we did use Flash, but we also use…NNNNNNN has proprietary design development system called K…, and it allowed you to, it would be similar to Captivate or Articulate. Or Coursebuilder, some of the major authoring tools that are out there. You go in, and you actually build your story board on line, and you can release those storyboards to your SMEs or your clients. For input they can do a virtual online repository, they can actually go online, they can just log in the internet. Once approval is granted, and access and make changes, approval, etc all online, and once the storyboard or the course, depending on where you are in the process, is approved, then the email is automatically generated to the designer-developer, and the designer-developer will go back in and make the changes, the customer can only do edits but they weren't really approved and accepted to the system, so once the kind of design review process could take place off storyboard and it also can take place off beta where you have a prototype of the web course and then can come depending on the prototype level you could grant approval with the audio and animated assets or you can stage it in phases, it is a good way to have online and customer approval rather than sending by email. It was a very sophisticated system, and then when the actual course was complete you could download the assets directly to LMS or if the customer preferred a CD or some other final delivery we could do that as well, but or you could sometimes use FPP file too. It was an authoring tool that had online virtual collaboration. Well, we used Flash for the animation, I don't know software that they used for the video and audio and 3D. It was just so many things, and that is why you bring the experts to the table so you don't have to.

Q11dvii What hardware and devices were used?

A11dvii There were no hardware and devices been used in the project. Out of the 275 hours of web development probably less than 10% had video. We developed our own video, but they were very short clips, all less than a minute. Audios were for illustration or animation purposes Level 1 actually there was no audio, level 2 courses we had audio that was more for illustration, and level 3 had illustration but also synced to specific processes and procedures, all sequential time.

Q11e What were the outstanding features of this project?

A11e I think the size and scope, and being able to take the military and the government from all antiquated training procedures to update them to state of

art cutting edge, delivery, probably was the most outstanding feature which of course allowed them to increase student motivation, interest, engagement, and reduced the cost of delivery because they had all of these instructors delivering this content and now in most cases 30-50% was converted to web based delivery. I worked in both UK and US on this project. In initial planning I worked in US, and then once we were ready to implement analysis actually moved to the UK, and once we hired and trained the analysis team, it was about 3-4 month, then moved into development and remained onsite as development manager, then I actually hired and trained my replacement, and I came back into the States and I coordinated from this site for month or two and then I rotated off the project. In total, it was probably 4 months in the US, 1 year in UK, and then maybe 4 months in US on the back end.

Q11f Did it occur to you that you wish to have done the project differently?

A11f Yes, I think that was the biggest area of improvement was the schedule. We committed to develop that 245 hours in a year, and it was way too aggressive. What I would have preferred, which is the only way to do that when you have a real condensed timeline you have more resources so you can develop simultaneously at the same time. I wish that we had stretched that out over a longer time frame, because it was just the pace was just too quick. I think our quality suffered because of that and I think that another thing that we underestimated because the UK is an English speaking country, we underestimated the differences in the culture, so that even though they speak English, it is a foreign country, so there were a lot more things that we should have planned for that. Took longer in the actual design and development, but we didn't realize that until we really got into it, so if we had taken more time, add more time to the design and development, we would have increased the quality of the actual product that we delivered. The personnel picked in UK, would have helped, but unfortunately all of the designers and developers were back in the US, so what we had in the UK were, of course, reviewers, that were reviewing for language differences and analysis. But because we were moving at such a rapid case that they didn't catch everything. So unfortunately we had customers asking things, and of course you never want that. We didn't have challenge of budget. We negotiated that upfront so we were able to add the resources within the budget, that was fine. The customer is the one that dictated the deadline or timeframe, based on that timeframe we hired the amount of resources that were needed, but it was still very rapid.

Q11g What were the solution(s) to the challenge(s)?

A11g When you are running a web based project, it is really a triangle: time, resources, budget. It is an equation, and quality. So if you play with the budget you are going to impact the time, resources, and quality. If you play with the time, you will impact resources and quality. So anytime you change a factor in that equation, it is going to have an impact on the remaining elements. So, in our particular case, time was a challenge. So we tried our best to balance and change the time and tried to mitigate the impact on quality by expanding the budget, and expanding the resources. But in the end, as I told you, we went

over by 90 days which is not that bad in a project of this size and magnitude, but we did go over and then, the quality in some instances suffered.

Q12a What specific knowledge, concepts, and ideas that helped you?

A12a People with strong experience and knowledge of transformation or change theory, because you are dealing with SMEs or customers who are being forced to change. For example the instructor was an SME who knew that once this course was implemented that they would lose their jobs, Ok, so, maturity, experience in change, transformation management, I think is essential, also stakeholder management when you work on a project of this size, it is very important that you have managers who have experience with working with a variety of stakeholders who might have different interests, some being supportive and positive, some being negative again, so learn how to manage stakeholders with various agenda I think is important. Of course, you need people with the skill set to do the job, the analysis, design, development.

Q12b What soft skills did you use? Use design skills for project?

A12b Yes, we used, analysis design development skills, absolutely. Other than communication skills, time management, project management, again just being a student dealing with stakeholders, understanding politics, how to manage through all of that. When we had designers and developers who were instructors and had a basic understanding of the content themselves, that helped too. As some SME may lose their jobs, making them to cooperate was critical. In the military it is pretty easy, you just go to their superior to get orders, but that is not the most proactive and effective manner of getting cooperation and buy in so what you really try to do is to be considerate of their time, try to be sensitive to their employment situation, and show respect for their expertise and knowledge, so you do a lot of stroking, and just be sensitive, make sure they understand what you have been asked to do, that you keep the project professional, and that shows sensitivity to their concerns, a lot of times just listening, letting them vent. I find if you can educate them in the process of how it works, not be defensive, but be very honest about the pluses and minuses of web based design, and what it can replace. A lot of people think that when you're going to do web based training, that you are going to create courses and train everything on the web when that is not very valid. Content and learning objectives should never be taught online, so it is a matter of educating them about web based design and development and what it is you are doing, many times addressing their fears and concerns will allow them to be a little more comfortable with you. But at the end of the day, you will have people who don't want to change, don't want to work with you, and will try to sabotage your project. So in those cases, you will just have to address those concerns. What I find is that just like in any technology, it is all about cost savings, it is about efficiency, it is about cost savings. And at the end of the day, those companies that are implementing web based training whether it is education, the government, or ….they are responding to be more efficient, more effective and reduce costs even though not all of the instructors lose their jobs, there is a reduction in staff, and that is primarily because the elements are able to create learning paths and plans, pushing the responsibility

for training and development onto the employee, and so the end result you have less people managing those processes and so the end result is that you are able to reduce that and save dollars.

Q12c What hard skills did you use?

A12c Hard skills across the board are required, people need to understand the analysis, design, redesign, development evaluation process ADDIE. You have to have hard skills. You must understand how a Flash course developed even though you may not develop the course. You must understand the process for creating audio files, downloading those into a web course, and asset like graphic skills or animation. It is important that whoever is working on a project have a level of knowledge of those things, is that you are talking about? Have to understand the model, project plan, how the whole project and process works. From there, depending on your role or responsibilities will determine hard skills. Obviously for my people doing edit, review, or language transitional obviously they would need good language skills, good grammar skills, writing skills. Developers and designers certainly need a good background in special design, but they also need good language skills, good writing skills. People doing the audio need to have good speaking skills, communication skills, so it just depends on your role what skills are needed.

Q12d What attitude did you realize that was helpful for the success of this project?

A12d Clearly everyone needed to have a positive attitude about the challenge of meeting the deadlines and schedule, they were very aggressive, so it was required that everyone have a can-do attitude, that they be part of the team, and that they have a willingness to work in a chaotic, fast paced environment. The schedule was a challenge, definitely we needed people who had a positive attitude about achieving the goals. Secondly, we need people who were comfortable in self initiation, so if there was something that needed to be done, except there is somebody to tell you to do it, because the timeframe, we needed people who were self starters, were self motivated, and would take on more responsibilities and complete tasks, even though it may have fallen outside of their job responsibilities. People with good judgment, people who could say I know how to do this, or I'll take care of it, and or I don't know how to do this. So rather than mess it up, let me go talk to my lead manager, and see if they can give me some guidance, so I know how to handle it. So people shall have good judgment. I would also say that people that were open to change. When you have innovation replacing something that has been in place for many years with technology change, you have people who are early adopters come on board, you have people who drag their feet and want to know what is in it for me, people who are resistant to change. What we really need is that people were willing and flexible and could change, and had a positive attitude about embracing change.

Q13 What do you wish to have known that you didn't know back then?

A13 I really wish that I knew from the culture standpoint that I wish I had a better understanding of the cultural changes between the UK and the US. If I had a better idea of what those were and how to handle the cultural issues we could have avoided a lot of mistake. If we would have had a better impact of the

time change, in the U.K. it is 5 hours ahead of us, that meant when they were leaving work, the U.S. people were just getting to work, we had to take some adjustments so that when we said "by close of business", the U.S. was closing business and the US people had gone home. There were a lot of cultural changes and adjustments, language changes that we had to learn on the fly. And I think if we had done a better job of preparing people for the culture differences, the time differences, we could have avoided a lot of problems. So I wish I had known the impact of those things ahead of time and I could have accounted for those things. For example, I didn't know the military essentially, the military and adjust the culture, what is the best way to say this. Most people just don't work during Christmas, the whole month of December they take off, while in the U.S. we take Christmas and maybe a week or two weeks, they take off the whole month off. Another example, for Easter, we have Good Friday and Easter, but they take two weeks. Most people take their vacations on or around the Easter holiday. Christian holidays are very important and so essentially that is like our Christmas here, most of people are out of for a week or two weeks, over there two three weeks. So essentially the project came to a standstill during that timeframe. Also, different words, English words mean different things here versus there, the pronunciation, even though it is English, so "aluminum" is "alamenium" ray….so it is pronunciation. So we had to redo a lot of audio because of differences in the culture and the pronunciation, the way thing they say. You can say it one way, they would say "oh, no, it is wrong," but not wrong it is just how they say it. And like the date, we do April 17, we do the month, the day, the year; they do the year, the day, the month. If I had known those we could have allotted for those, what happened was that you don't want to do is have changes, get all the way to a web course and you have all the information and you have to change it is very expensive and very time consuming, where if you would have known upfront you could have written it correctly in the first place.

In the audio, to deal with American accent and British accent, we had British narrator, but they didn't say, "Hi, you have this written wrong". So to pay someone to narrate, to take those files, those MP3s, and embed those in the course and to have a customer or somebody in U.K. to review those and say they are wrong, you have to go back and re-narrate. So if we had a better handle on the cultural differences, we made a lot of assumptions because they were English speaking, because they were English speaking, but if we had known those things up front we could have planned for those, but we didn't. So it caused re-dos.

Q14 What are the other knowledge, skills or attitude which were not used in the above project but you used in other Web Based Instruction projects you led?

A14 Definitely you need human performance technology skills, consulting skills, need to know how to go in and perform organizational analysis, cost analysis, perhaps even a little bit of Six Sigma where you go in and consult problem solve and effectively identify costs associated with inefficiencies, identify waste, and so I think that organizations that are looking to bring convert to web based training, they want you to be able to come in and determine the

current state, recommend the future state, come up with interventions, that need to be implemented to take the company or organization to make the changes they are looking at. So one needs to be versed in ability to HPT, Six Sigma, or other forms of change and consulting methodologies, you need those skills in your tool kit.

Q15 Assuming you are hiring a person as a beginning instructional designer in Web Based Instruction, what skills are you expecting?

A15 Depends on their role, if they are a designer-developer they need to know Flash, storyboarding, how to use authoring tools, how to write an audio and video script, they need to know how to develop assessments and quizzes, need to understand a whole theory behind criterion reference tests and how you can create objectives supported by tasks, they need to know how a course kind of flows, how you build a course from beginning to end through assessment, need to understand how to work with clients as subject matter experts, need time management and good project management skills.

Q16 Assuming you are hiring a person as an experienced instructional designer in Web Based Instruction, what skills are you expecting?

A16 An experienced instructional designer needs all of those things, but they also need to be able to manage clients and multiple courses in project at the same time. Regarding the minimal education requirement, instructional design developers should have instructional degrees in instructional design through technology, for beginner and expert both. I think this is professional where you should come out of school and have certification. I also think that the more advanced instructional designers shall have training in HPT and also Six Sigma. They should be certified at least Green Belt if not Black Belt. I don't believe they should be Black Belt. Definitely they should be certified in Six Sigma and Green Belt. I also think they need to have training and certification in HPT. It also helps to have seniors and design development or managers to have experience in training, I mean in business, sales, marketing, consulting, as well as basic business because you do a lot of proposals, a lot of budgets, and also project management.

Q17 Which direction do you see Web Based Instruction is heading to?

A17 I think it is becoming more, I think the technology is allowing for rapid design and development, rapid prototyping. I see it being more virtual, allowing for more online collaboration. I also see integration of distance education with virtual instructors being incorporated into web based design or to supplement web based design. And then I see it becoming even more prescriptive where individuals regardless of the profession will be able to go into online course wares and assigned up for online courses, I see it being more prevalent and more accepted. Those are more informal training. Across industries, across business sectors, and across professions. We have hospitals and doctors now are doing online training, and not just training, we can do 3D surgery now, and I need to practice online versus cadaver. I see the application being utilized in new frontiers, industry, and professions.

Q18 What do you think an instructional designer should do in order to keep up with this direction?

A18 I think it is very important that instruction designers are trained properly in analysis, and how to correctly identify training objectives that are appropriate for web and not appropriate for web, and also understand the requirements, understand how to treat the content to allow the learners to be effective. For example, if I am, going back to the medical example where doctors are practicing certain medical procedures, that can't be a page turner in a course without audio. Designers need to understand how to match the level of animation, audio, to sequence level of the audio for audio with the content. By the same token, if it is just an awareness course, maybe you don't even need audio, maybe just text and still define…How to march the instructional delivery with the learning goals and objectives is just going to be critical. So designers need to be trained in how to do that. To keep up with new technology, I do think it is important that designers are trained in a spectrum of tools. When I was in school, we learned Dreamweaver and that was it, and I don't think that is sufficient anymore. Let me just say that regardless of the method of delivery that the instructional design process at high level is the same. I might chunk my content differently, I might break it down into smaller chunks, large chunks, I may focus on one objective or five objectives, but how that course is laid out and how people learn remains the same. So I do think that if you make sure that, and instructional designers understand the design development process and how people learn and if you provide them with a spectrum of authoring tools I think they can make that lead to…especial those…For me I don't know how to use Articulate. I taught my self how to use Coursebuilder. So for me to move from tool 1 to tool 2 was easy. I know how to use Flash, so I know how to do simple animation in Adobe, and Photoshop. So I think if you train designers on a spectrum of different tools, how do you use audio tools, how do you use video tools, how do you use still photo images, how do you do authoring tools, I think then it becomes important to them to be able to gravitate to a new tool. When I got out of school I was at a disadvantage because the only thing we learned was Dreamweaver, and then when I entered the workforce nobody was using Dreamweaver. I think if you give them a spectrum of tools and skills. I was a business/finance major when I came out of school and fortunately I learned how to do online modeling, create balance sheets, income statement, financial projections, and also how to do forecasting models online; I learned how to do that tool in school, so when I joined the work force, CMACA didn't use the same tool that I learned on at school, but I could readily learn how to use that tool because I knew what I had to do. But I just think that educational professionals will need to do the same, and equip the students to design courses that have different methods of delivery and more than one tool, and I think that when students come out and join the workforce where they will be able to quickly change the specific tools that they will be able to use by that employer. Unfortunately, right now too many designer-developers don't know to work with video, don't know how to work with audio files, and that is unacceptable. The program did not train them how to use those equipment. How can you say you are an instructional designer and you don't know those

things? I just don't think that is correct. They just need to incorporate into school curriculum. I think different schools that are providing degrees in instructional design need to include all of those tools and software program into their programs, but they are not doing that and that is unacceptable. It should be in the program. When I graduated with my Master's, I learned how to use Excel, IBM Lotus application, so when I went to work for employer regardless what software that employer use, I knew how to create financial spreadsheets.

Q19 Anything else that was not covered in our conversation but you think is important?

A19 Students need strong background in instructional design theory, learning theory, I think that is critical that they understand the theoretical domain of the field. Many times I have designers that do things and they don't know why they do it. I actually had a designer develop a course and didn't have an advance organizer, didn't have a table of contents, or didn't state purpose of the course. I think understanding the domains of the field and why we do things, theoretical background, of call it ADDIE model, is critical. Now the other thing I would say, I think that students need practical experience too, whether they do internship, whether they required to developing courses in an actual school, I do think that the practical experience is just as important as a theoretical background. They need practice, and they should have a portfolio when they come to the workforce of experience where at least they have been exposed to development and design on a practical level. Strong background in summative and formative evaluation would help too.

APPENDIX G RAW DATA

No.	Skill Description	001	002	003	004	005	006	007	008	009	010	012	013	014	015	016
1	Analyze the given data (needs analysis, course requirements, performance analysis, existing content etc.) from customers or stakeholders	54-56, 70-72	141-143, 365-370,			189,		48-49,	419-426,	158-162,	192-195, 262-268, 297-304,	73-82, 87-90, 117-121, 264-269,		78-83, 106-108,	167-168,	
2	Create relevant learning objectives and corresponding instructional strategies	57-58, 278-281, 420, 422-424,	95, 164-167, 177-178, 313-317,			274-275,	127-129,	60-61, 168-174,	99-102, 128-130, 406-407,		355-357,	485-486,	106, 235-239,	68-70, 111-114, 115, 222-223, 288-289, 614,	68-70, 188-194, 353-354, 425-427,	103-104, 155-156, 515-516, 552-554, 560-562,
3	Ensure the interface is created and compatible with other media elements	58, 357-359,														
4	Develop and utilize testing and review strategies for quality control	59, 62-63, 234, 250-251, 269-270,	98-99, 105-106, 237-239, 248-253, 259-262, 281-284,	96-99, 57,	166-168, 198-200,	389-390,	80-84, 214-216,	63-65,	147-148,	83, 93-94,		150-152, 226-227, 566, 568,		124-130,	98, 107-110, 210-213,	345-348,
5	Create storyboards with descriptions for graphics, audio, video, interaction, and simulation, as well as audio scripts	62, 266-268, 324-325, 421-422,	95, 205-209,	69-70, 95,	108-109, 163-164, 193-194, 302,	94, 297,	300-303,		110-116,	120-123, 127-128,	436,	551,		118-119, 289-291, 307, 513-522,	76, 169-172,	513,

6	Educate, mentor and provide documentations to the team or other related staff about the right procedure	373-379, 432-434,	473-474,			117-119, 290-292, 582-583,	709-710,								514-515,	
7	Revise as necessary based on the feedback from customer(s) or sample audience	67, 114-115, 292-293, 297-298,	102, 212-213, 248, 253-254,	81-82, 95,	119, 202-209,	394-396,	135,			87-88, 140-141,	353-354,	204,		147-149, 170, 320-321,	120-121, 227-228,	119-122, 166, 169-175,
8	Create a prototype to communicate the look and feel and/or basic functionality	73-78,	197-204,			120-121,	159-166,						200-209, 232-235, 241-243, 246-249,			538,
9	Accommodate customer's or stakeholder's needs, schedule, style, and culture	91-92, 185-188,			228-229, 480-503, 579-581,	207-211, 598,	147-148, 467-468,			249-251,	95-96, 468-470,	223-224, 279-283, 319-320, 352-356, 381-389, 394-403,	104, 125-126, 182-187, 538-545,		224-226,	390-391,
10	Undertake content research and analysis utilizing existing or public resources	96-101,	151-156,	65-68, 172-175,	107-108, 217-218,	145, 479-481,	298,	61-62, 97-99,	96-97, 335-336,	109-114,	268-275, 622-627,	85-87,	86-87, 107-110,	85-87,	75, 483-484,	
11	Build and maintain effective relationship with SMEs, customers or stakeholders, including managing difficult SMEs, customers or stakeholders	101-104, 194-201,	382-400,	119-122, 222-223,	287-293, 319-320, 414-439, 650-651,	248-270, 527-529, 560-561, 565-573,	274-281, 306-309, 354-358, 394-403, 463-466, 557-559,	210-211,				138-142, 215-216, 244-245, 269-278, 294-298, 389-391, 460-	191-198, 288-292, 316-318, 325-328, 416-431, 496-502, 554-	632-633,		370-380, 387-388, 518,

												475, 553-558,	562, 578,			
12	Validate content or strategies by formative or summative evaluation or both with sample audience onsite or remotely	113-114, 120-124, 291-292, 294-297, 431-432,		56-57, 79-81,	121-124,	554-556,		187-190,	149-150,	97-98,	522-525,	153-157, 185-186, 194-198,	187-189,	162,	110-115, 149-155, 199-201, 582-583,	118-119, 164-165,
13	Deliver and implement the end product (to the customer) in a format or platform appropriate for the learning and management environment	67, 115-116, 298,			71-72, 125-126, 210-212, 648-649,	80-85,	77-78, 187,	67, 92-93, 156,	152-160,	84, 233-235,	335-336,	252, 430-431,	114-115, 286-288,	375-377, 630,	77, 147-149,	107-108,
14	Develop and implement level 1 and/or level 2 evaluation plans	83-84, 124-126, 293-294,	109-111, 114-120,	70-71, 82-85, 95, 108,		168-170, 306-309,	184-186, 540-541,	65-66,	105-106, 261,	84, 201-202,		187-192,		162-164,	78, 391-393, 622-623,	111-117, 514-515,
15	Create efficient workflow and platform for internal and external collaboration	63-67, 129-135, 282-284, 344-345	232-237,	74-76,	48-49, 201-202, 673-692,	559-560,	239,	73-74,	138-146, 340-349,	101-103, 145-147,	89-91, 97-100, 149-152, 476-481, 827-833,	165-172, 228-229, 236-238,		198, 227-230, 336-345,		96-97, 424-425,
16	Design and develop appropriate interactivity or instructional activities to allow learners to practice, apply, and engage	139-144, 285-286,	183-185, 311, 353-355,	123-130,	73-76, 153-157, 389-390, 613-614,		179-181, 303, 360-365,		269-283,	135-136, 216-218,	899-901,	374-375,	114, 163-168, 405-407, 686,	54-58, 301-306, 310-314, 346-352, 413-		

														415,		
17	Design visually appealing instructional materials	144-145, 355,			508-510,		359,	167, 190-196,		282,	723-724, 898-899, 915-916,		633-635,	70, 322-331,		
18	Add interesting and fun elements to the learning experience	147, 349,			67-71, 326-336, 390-393, 403-404,	328-331, 333-338,	360,						609-610, 621-623, 687-689,	68, 301, 419-420,		
19	Manage budget	160-161,	223-226,	103-106, 159-160,	396-398,		167-172, 253-256, 283-290, 708,						302-303,			534,
20	Provide operational templates, other technical specifications, standards, and repository to achieve efficiency and consistency within the team	161-165, 325-326, 337-339, 343-344, 430-431,	168-169, 191-196,			312-317, 331-332,	150-156,	123-131, 152, 314-315,	121-123, 160-161,			231-236,		119-123, 345-346,	90-91,	
21	Collect, understand and analyze learner characteristics	167-169, 205-206,	176, 327-328,		237-247,	190		175-176,	303-308, 357-361, 382-389, 407-408,	103-106, 256-257,	618-619,		59-62, 105, 123, 398-403,		79-84,	

22	Promote and apply instructional principles, theories, and research results to the instructional system design process	171-174, 381-382,	345-348, 443-449, 455-457,	150-154, 166, 200, 210,		533-545, 615-616, 690,	111-113, 443-459, 666-675,	206-207, 236-240, 304-307, 368-372,	322-324, 441-444, 521-522,	227, 278-279,	289-290, 556-565, 575-576, 803-820, 874-884, 951-953, 964, 1157-1160,	368-371,	455-460, 547, 636-638, 651-657,	458-461, 608-610,	86-90, 597-599,	124-125, 607-613,
23	Write and edit text clearly, correctly and appropriately for the target audience	176, 392, 420,	350-353, 404-408, 457,	156, 205,		271-274, 548-549, 592, 617, 669-673,	514, 695-700,		444,	244, 273,	428-429, 649-650,	421-422, 530-531,		76-77, 483-494, 600, 610-612,		427-428,
24	Pay attention to details	176,	350, 457,									638,		598,		
25	Lead, manage, and coordinate with team members	120, 176-178, 239-241, 305-314, 320, 322-323, 326-327, 385-386, 398-399, 430,	480,	73-74, 142, 212-213, 217,	318,	128-129, 134-136,	70-72, 93-94, 219-222, 262-264, 282, 292-293, 312-313, 345-346, 482-485, 707,		51-52, 125-126, 131-133, 222-224, 229, 453, 509-510,	182-185, 196-198, 284-285,	957-962, 1131-1134,	172-181, 245-246, 534-538, 553,	309-311, 578-579, 580-581, 640,	90-93, 130-131, 184-185, 321-322, 434-438, 448-450, 479-482, 601-602,	625-626,	104-105, 182-183, 186-188, 201-203,
26	Communicate clearly and effectively in a language understood by developers	178-181, 212-216, 340-342,	215-221, 244-247,		605-607,		368-369,	319, 320-322,	455,		973-976,	238-240, 527, 557,		133-135, 189-190, 425-430, 441-448,		

													497-500, 522-527,		
27	Be creative and innovative	183,			401, 581-585, 641-645,	640-641,		111-119,	483-490,	251,	1336-1346,		77-84, 318-320, 605, 615-616,	114-115, 138, 173-174, 297-300, 359-361, 413, 589,	482-483,	
28	Ask the right questions to extract information from SMEs and stakeholders	188-194,	143-148, 240-243, 356-365,		139-141, 218-219, 412-414,	222-227, 559, 633,	86-89, 115-120, 514-518,	211, 232-233,	330-333,	90-91, 231-232, 273,			126-127, 218-228, 245-246, 506-523,		603-604,	
29	Be patient	205, 394-395,				598-599,										
30	Study the knowledge of the subject matter with interest and curiosity	205,	371-372, 431-436,		467-468,									87-88, 215-218,	142-147,	
31	Support and coordinate with the project manager/ manager	238, 321,	289,		308-317,	31-32,	271,		228, 417-419,							
32	Conduct focus group to assist task analysis	246-247, 431,							409,							
33	Chunk or sequence instructional content for a course	258-259, 260-263,		69,	144-149, 152, 182-183,		121-122, 299-300,		102-105,	83, 118-119,			228-231,	223-224, 467,	70,	156-157,

34	Plan and stage a sign-off or buy-in process with the customer/stakeholders	264-265,	170-171, 255-256,		109,	122-123, 338-341, 369-372, 381-386,	91-92, 136, 173-175,		216-222, 337-340,		331, 467,		152-158, 333-338,	194-196,	97, 203-205, 214-216,	105-106, 145-147, 150-151, 165-166, 166-167, 255-256,
35	Select and partner with the vendor or get support from another team	321,		51-53, 99-101, 161,	258-259, 376-373,	72-76, 114-115, 349-355, 363-365,	72-76, 202-204, 207-211, 291-292, 436-441, 490-494,		52-53, 284-285, 403-404,		438-441,		352-360,			231-233,
36	Keep track and report on project progress	323-324, 386-389,	289-291,	156-157, 210-211,	220-223,		226-227, 269, 480,		337,	147,	343-350,	143-149, 158-164,	382-389, 576-578, 580, 587-590,	232-234,	624,	196-198, 257, 535,
37	Identify the capabilities of commonly available software and tools	334-335, 339-340,	512-513,		516-517, 550-573,	618-620,	524-528, 686-688,	319-320,	352-354, 374-375, 440, 446-447,	274-277,	459-461, 1210,	488-494,		508-513, 527-532, 535-538, 542-544, 621-622,		
38	Maintain good computer skills in general	203, 392,	404, 487-490,	163-165, 202-203,	346-347, 506-508,		682-683,	142-146, 290-291,	448-449,	244, 274,	455-459, 768-770, 865, 892-898,				592-594,	419-422,

39	Respect others and treat them fair and professionally	400,		122-123,		524-526, 559, 564-565,	417-424, 479, 495-496, 559-572, 709,		333-335, 445,		220-223, 251-253, 597-598, 955-957, 964-965,	505-509, 572,	437-438,			391-394,
40	Learn and try out emerging technologies and methodologies, be open minded	406,		177,	469-471, 603-604, 635-636, 705-710,	593-596, 627-631,	683-686, 710-711, 725,	289-290,	504, 518,	267-269, 273, 296-305,	604-606, 796-798, 861-862, 932-934, 1061-1063,		611-612, 672-681, 698-717, 736-740,	538-540,	276, 376-378, 507-510,646-647,	447-453, 563-579,
41	Understand the overall business process and objectives	409-410,					462-463,	240-242, 264-279, 304,	395-397, 497-500,	198-200,		480-482,				507-508,
42	Educate SMEs and customers/vendors/stakeholders			76-79,	404-410,	90-91, 236-239,	388-389,	243-250,					273-281, 323-324, 531-532, 591-598,	602-605,	287-288, 605-606,	127-136, 137-142, 395-403,
43	Join professional organizations and social groups and attend the meetings and events, physically or virtually	441,	515-527,	246-247, 258-262,	698-701, 712-714,	689, 694-697,	13, 711, 725-726,		522-523,	305-310,	1210-1219,	620-621, 627-630,	741-742, 753-757,	653, 658-665,	646,	37-39,
44	Read widely on professional discussions and publications	445-447,	439-442, 501-511,	246,	695-698,		711, 726,		503, 518,			631-633,	732, 757-758,	653-654,	645-646,	
45	Network regularly with other processionals			246, 258,	724,	697-698,					1220-1228,		749-752,			

46	Develop and implement level 3 and/or level 4 evaluation plans		127-131,		76-77, 111-114,				178-181,		351-353,		116-120, 169-181,		155-158,	
47	Observe and analyze master performers to assist task analysis		157-159, 327,		61-63, 138-139,				86-93,	258-259,			144-151,		402-403,	
48	Work with remote team members, SMEs, and customers/vendors/stakeholders		161-163,	143-147,	44-48, 226-228, 229-235,		84-86, 594-601,		42-43, 136-138, 516,					400-404,		183-184, 331, 539,
49	Determine appropriate technique, technology, and media to support learning objectives and strategies		187-188,	191-193, 213-214,	142-143,	211-217, 302-306, 372-374, 549-552,	199-200,		262-269, 288-294, 433,	94-97, 124-127, 209-214, 236-239,	140-144, 307-308, 378-379,		93-96, 111-113, 249-257, 403-405, 469-473,	363-369, 469-474, 569-579, 589-592,	579-580, 606-608,	99-102, 157-159, 557-558,
50	Manage time efficiently	161,	229-230, 372-377,	99, 221,	374-376, 459-464,	367-369, 419-423,	99-106, 205-206, 212-213, 268, 403-408, 708,		378,	150-154,	103-104, 332-334, 515-518, 835-839,	184-185,	311-313, 369,	152-156, 240-244, 451-456,	74,	337-339, 364-366, 519,
51	Work on multiple projects at a time		377-382, 457-458,				430-431,			245-247,						191-194, 523-524,
52	Organize and archive documents and other materials	385,				378-381,	480,			244-245,				554,		
53	Ensure the instructional content is appropriate in language and culture for global audience and translation		408-413, 416-423,	166-169,		657-659,	614-663,				338-342, 667-685,					342-345, 455-496,
54	Identify the needs and performance gap		326,	49-50, 201, 208-210,	262-274,	130-132, 190-199			60-86, 212-215,	259-262,	398-399,	93-96,		629,	578-579, 581-582,	500-507,

55	Write design documents	61, 252-255,	179-181,	53-55,	108, 178-181,	92-93, 270-271, 276-281,	89-90, 295,	313-314,	95, 106-108,	92-93, 228-229,	423, 462-467,	550-551,	363,	117-118,	168-169,	98-99,
56	Understand and utilize LMS or other implementation environment for implementation, training management and possibly performance improvement recommendation			59-60, 165,		163-164,	532-538, 541-548, 582-585, 688-691,	311-312,	151-152, 162-166, 354-356,		449-451, 1195-1198,			379-380,	274, 620,	
57	Set up and schedule training sessions			58, 143,						132-133,						
58	Administrate registration process			60-62, 101-102, 160-161,	336-339,											
59	Organize a set of related content into a curriculum or program	87-88, 148-152,				416-418,			35-37,		365-376,			62-65,		67-72, 88-89, 92-95,
60	Write training/business proposals	110,														534,
61	Apply message design principles for screen design		339-340, 413-416,		614-624,		520-524, 675-682,		324-327, 520,	274,	724,	373-374, 375-376,	608-609,	267-269, 464-466,		
62	Create and edit graphics and other non-multimedia instructional materials			106-108, 109,	194,	321-324, 465-466,		96, 291,	286-288,	83,	162-165, 305, 423-424, 1198-1199,	240-242, 306-308, 571,	113, 364-366, 549,	307-310, 535, 592-593, 622,	76, 195-196, 273, 333-335, 591-592, 620-621,	513,
63	Produce and edit animation, video and audio web materials				61, 89-90, 303, 324-325, 351-356, 519-	94, 362-363,		119, 134-140,	126-127, 297-299,	282-284,	306, 334-335, 424, 568-575,		113, 262-266, 362, 548,	75, 620,	196-197, 273, 328-333, 620,	593-595,

					521,										
64	Do programming or coding with computer languages			203,	88-89, 219-220, 302, 340-342, 517-519,			131-133, 207-208,	49,		723, 731-723, 967-968,	423-425,			97-98, 207-209,	
65	Collect, establish and disseminate lessons learned and best practices within the team or for one's future work	367-371,	328-329,	134-137, 220-221,	363-364,	489-521,										
66	Benchmark other organizations			249-250,			707,		169-176,							
67	Evaluate and determine appropriate tools for design and development				189, 545-546, 589-590,	217-220,	130-133, 323-325,	99-108, 199-205,				251-252, 305-306,	159-163, 212-216, 363,	314-318, 372-375, 378-379,	313-318, 366-367,	
68	Keep proprietary information confidential and follow the required procedures				248-250, 277-279,											
69	Listen well to understand and translate information for instruction				443-458,				454,		602,	510-522,		597,		
70	Be passionate and enjoy your job				476-478,	598, 686,	572-578,		391-394, 529-532,		773-782, 856-860, 932,		409-411,		657,	
71	Work with the combined roles of project manager, instructional designer, instructional developer in a given project			94,	303, 521-523, 631-632,	27-29, 453,		78-80, 95, 217, 297-298,		85-86, 169,	432-434, 862-865,		551-552, 642-647,		348-349,	

72	Create project plans					107, 419,	257-262,						307-309, 372-382,		319-320,	126, 136-137, 142-145, 161-164, 185,
73	Negotiate with customers, vendors or stakeholders to manage expectations, goals and resources					424-434,	380-386, 496-498,		229-237,					476-479,	431-447,	354-355,
74	Present in meetings		318-319, 521-522,			593,				239-242,	641-648, 965-966,					257-258,
75	Facilitate training sessions									128, 232-233,		495, 500,				
76	Run statistic research and analysis on the collected evaluation data								181-190,		359-364,			165-169,		
77	Recommend other instructional or non-instructional interventions using the evaluation data								191-197,		197,			169-170,		
78	Sell ideas, proposals, or expertise to the management								429-433, 454,				598-602,		489,	
79	Comply with participating employee's union regulations and policies												338-347, 523-526,			
80	Recruit and allocate human resources															239-248, 328,
81	Self-motivated, committed and positive											433-439, 546-547,		249-250, 593-594,		437-443,

82	Direct, monitor or act in the audio or video recording				150-152,	353-355,			134-136,		435, 438,	495-498,			205-207, 275,	
83	Deliver instructions and training synchronously or asynchronously			140,								495, 498-499,				
84	Align business goals to instructional objectives			201,				256-261,			94-95, 144-147, 161-162, 188-190, 323-331, 587-593, 793-795, 1120-1122,	440-457, 526-527,				
85	Identify the potentials and limitations of WBI				593-602,	178-180,					94, 104-110, 337-338, 839-844, 917-929,	528,				
86	Get professional certification or recertification									33,		623-627,	40-42,		36-37,	529-532,
87	Analyze the characteristics of the learning environment					199-206,								143-147, 357-359,		
88	Be sensitive to accessibility design													406-411,		
89	Adapt to criticism and changes without taking personally		425-431,	177-183,				322-330,						270-275, 500-505,	532-534,	

90	Set an example by working hard												571-575,			
91	Update knowledge and skill set by going back to school for formal training										43-48,					

APPENDIX H RAW DATA WITH LEVELS OF SUPPORT

No.	Skill Description	001	002	003	004	005	006	007	008	009	010	012	013	014	015	016	Total count
1	Analyze the given data (needs analysis, course requirements, performance analysis, existing content etc.) from customers or stakeholders	2	2	0	0	1	0	1	1	1	3	4	0	2	1	0	18
2	Create relevant learning objectives and corresponding instructional strategies	4	4	0	0	1	1	2	2	0	1	1	2	6	4	5	33
3	Ensure the interface is created and compatible with other media elements	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2
4	Develop and utilize testing and review strategies for quality control	5	6	2	2	1	2	1	1	2	0	4	0	1	3	1	31
5	Create storyboards with descriptions for graphics, audio, video, interaction, and simulation, as well as audio scripts	4	2	2	4	2	1	0	1	2	1	1	0	4	2	1	27
6	Educate, mentor and provide documentations to the team or other related staff about the right procedure	2	1	0	0	3	1	0	0	0	0	0	0	0	1	0	8
7	Revise as necessary based on the feedback from customer(s) or sample audience	4	4	2	2	1	1	0	0	2	1	1	0	3	2	3	26
8	Create a prototype to communicate the look and feel and/or basic functionality	1	1	0	0	1	1	0	0	0	0	0	4	0	0	1	9

9	Accommodate customer's or stakeholder's needs, schedule, style, and culture	2	0	0	3	2	2	0	0	1	2	6	4	0	1	1	24
10	Undertake content research and analysis utilizing existing or public resources	1	1	2	2	2	1	2	2	1	2	1	2	1	2	0	22
11	Build and maintain effective relationship with SMEs, customers or stakeholders, including managing difficult SMEs, customers or stakeholders	2	1	2	4	4	6	1	0	0	0	8	8	1	0	3	40
12	Validate content or strategies by formative or summative evaluation or both with sample audience onsite or remotely	5	0	2	1	1	0	1	1	1	1	3	1	1	4	2	24
13	Deliver and implement the end product (to the customer) in a format or platform appropriate for the learning and management environment	3	0	0	4	1	2	3	1	2	1	2	2	2	2	1	26
14	Develop and implement level 1 and/or level 2 evaluation plans	3	2	4	0	2	2	1	2	2	0	1	0	1	3	2	25
15	Create efficient workflow and platform for internal and external collaboration	4	1	1	3	1	1	1	2	2	5	3	0	3	0	2	29
16	Design and develop appropriate interactivity or instructional activities to allow learners to practice, apply, and engage	2	3	1	4	0	3	0	1	2	1	1	4	5	0	0	27
17	Design visually appealing instructional materials	2	0	0	1	0	1	2	0	1	3	0	1	2	0	0	13
18	Add interesting and fun elements to the learning experience	2	0	0	4	2	1	0	0	0	0	0	3	3	0	0	15

19	Manage budget	1	1	2	1	0	4	0	0	0	0	0	1	0	0	1	11
20	Provide operational templates, other technical specifications, standards, and repository to achieve efficiency and consistency within the team	5	2	0	0	2	1	3	2	0	0	1	0	2	1	0	19
21	Collect, understand and analyze learner characteristics	2	2	0	1	1	0	1	4	2	1	0	4	0	1	0	19
22	Promote and apply instructional principles, theories, and research results to the instructional system design process	2	3	4	0	3	3	4	3	2	8	1	4	2	2	2	43
23	Write and edit text clearly, correctly and appropriately for the target audience	3	3	2	0	5	2	0	1	2	2	2	0	4	0	1	27
24	Pay attention to details	1	2	0	0	0	0	0	0	0	0	1	0	1	0	0	5
25	Lead, manage, and coordinate with team members	10	1	4	1	2	10	0	7	3	2	4	4	8	1	4	61
26	Communicate clearly and effectively in a language understood by developers	3	2	0	1	0	1	2	1	0	1	3	0	6	0	0	20
27	Be creative and innovative	1	0	0	3	1	0	1	1	1	1	0	4	7	1	0	21
28	Ask the right questions to extract information from SMEs and stakeholders	1	3	0	3	3	3	2	1	3	0	0	4	0	1	0	24
29	Be patient	2	0	0	0	1	0	0	0	0	0	0	0	0	0	0	3
30	Study the knowledge of the subject matter with interest and curiosity	1	2	0	1	0	0	0	0	0	0	0	0	2	1	0	7
31	Support and coordinate with the project manager/ manager	2	1	0	1	1	1	0	2	0	0	0	0	0	0	0	8

32	Conduct focus group to assist task analysis	2	0	0	0	0	0	0	1	0	0	0	0	0	0	0	3
33	Chunk or sequence instructional content for a course	2	0	1	3	0	2	0	1	2	0	0	1	2	1	1	16
34	Plan and stage a sign-off or buy-in process with the customer/stakeholders	1	2	0	1	4	3	0	2	0	2	0	2	1	3	6	27
35	Select and partner with the vendor or get support from another team	1	0	3	2	4	6	0	3	0	1	0	1	0	0	1	22
36	Keep track and report on project progress	2	1	2	1	0	3	0	1	1	1	2	4	1	1	3	23
37	Identify the capabilities of commonly available software and tools	2	1	0	2	1	2	1	4	1	2	1	0	5	0	0	22
38	Maintain good computer skills in general	2	2	2	2	0	1	2	1	2	4	0	0	0	1	1	20
39	Respect others and treat them fair and professionally	1	0	1	0	3	5	0	2	0	5	2	1	0	0	1	21
40	Learn and try out emerging technologies and methodologies, be open minded	1	0	1	4	2	3	1	2	3	5	0	4	1	4	2	33
41	Understand the overall business process and objectives	1	0	0	0	0	1	3	2	1	0	1	0	0	0	1	10
42	Educate SMEs and customers/vendors/stakeholders	0	0	1	1	2	1	1	0	0	0	0	4	1	2	3	16
43	Join professional organizations and social groups and attend the meetings and events, physically or virtually	1	1	2	2	2	3	0	1	1	1	2	2	2	1	1	22
44	Read widely on professional discussions and publications	1	2	1	1	0	2	0	2	0	0	1	2	1	1	0	14

45	Network regularly with other processionals	0	0	2	1	1	0	0	0	0	1	0	1	0	0	0	6
46	Develop and implement level 3 and/or level 4 evaluation plans	0	1	0	2	0	0	0	1	0	1	0	2	0	1	0	8
47	Observe and analyze master performers to assist task analysis	0	2	0	2	0	0	0	1	1	0	0	1	0	1	0	8
48	Work with remote team members, SMEs, and customers/vendors/stakeholders	0	1	1	3	0	2	0	3	0	0	0	0	1	0	3	14
49	Determine appropriate technique, technology, and media to support learning objectives and strategies	0	1	2	1	4	1	0	3	4	3	0	5	4	2	3	33
50	Manage time efficiently	1	2	2	2	2	6	0	1	1	4	1	2	3	1	3	31
51	Work on multiple projects at a time	0	2	0	0	0	1	0	0	1	0	0	0	0	0	2	6
52	Organize and archive documents and other materials	1	0	0	0	1	1	0	0	1	0	0	0	1	0	0	5
53	Ensure the instructional content is appropriate in language and culture for global audience and translation	0	2	1	0	1	1	0	0	0	2	0	0	0	0	2	9
54	Identify the needs and performance gap	0	1	3	1	2	0	0	2	1	1	1	0	1	2	1	16
55	Write design documents	2	1	1	2	3	2	1	2	2	2	1	1	1	1	1	23
56	Understand and utilize LMS or other implementation environment for implementation, training management and possibly performance improvement recommendation	0	0	2	0	1	4	1	3	0	2	0	0	1	2	0	16
57	Set up and schedule training sessions	0	0	2	0	0	0	0	0	1	0	0	0	0	0	0	3

58	Administrate registration process	0	0	3	1	0	0	0	0	0	0	0	0	0	0	0	4
59	Organize a set of related content into a curriculum or program	2	0	0	0	1	0	0	1	0	1	0	0	1	0	3	9
60	Write training/business proposals	1	0	0	0	0	0	0	0	0	0	0	0	0	0	1	2
61	Apply message design principles for screen design	0	2	0	1	0	2	0	2	1	1	2	1	2	0	0	14
62	Create and edit graphics and other non-multimedia instructional materials	0	0	2	1	2	0	2	1	1	4	3	3	4	6	1	30
63	Produce and edit animation, video and audio web materials	0	0	0	6	2	0	2	2	1	4	0	4	2	4	1	28
64	Do programming or coding with computer languages	0	0	1	5	0	0	2	1	0	3	1	0	0	2	0	15
65	Collect, establish and disseminate lessons learned and best practices within the team or for one's future work	1	1	2	1	1	0	0	0	0	0	0	0	0	0	0	6
66	Benchmark other organizations	0	0	1	0	0	1	0	1	0	0	0	0	0	0	0	3
67	Evaluate and determine appropriate tools for design and development	0	0	0	3	1	2	2	0	0	0	2	3	3	2	0	18
68	Keep proprietary information confidential and follow the required procedures	0	0	0	2	0	0	0	0	0	0	0	0	0	0	0	2
69	Listen well to understand and translate information for instruction	0	0	0	1	0	0	0	1	0	1	1	0	1	0	0	5
70	Be passionate and enjoy your job	0	0	0	1	2	1	0	2	0	3	0	1	0	1	0	11

71	Work with the combined roles of project manager, instructional designer, instructional developer in a given project	0	0	1	3	2	0	4	0	2	2	0	2	0	1	0	17
72	Create project plans	0	0	0	0	2	1	0	0	0	0	0	2	0	1	5	11
73	Negotiate with customers, vendors or stakeholders to manage expectations, goals and resources	0	0	0	0	1	2	0	1	0	0	0	0	1	1	1	7
74	Present in meetings	0	2	0	0	1	0	0	0	1	2	0	0	0	0	1	7
75	Facilitate training sessions	0	0	0	0	0	0	0	0	2	0	2	0	0	0	0	4
76	Run statistic research and analysis on the collected evaluation data	0	0	0	0	0	0	0	1	0	1	0	0	1	0	0	3
77	Recommend other instructional or non-instructional interventions using the evaluation data	0	0	0	0	0	0	0	1	0	1	0	0	1	0	0	3
78	Sell ideas, proposals, or expertise to the management	0	0	0	0	0	0	0	2	0	0	0	1	0	1	0	4
79	Comply with participating employee's union regulations and policies	0	0	0	0	0	0	0	0	0	0	0	2	0	0	0	2
80	Recruit and allocate human resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2
81	Self-motivated, committed and positive	0	0	0	0	0	0	0	0	0	0	2	0	2	0	1	5
82	Direct, monitor or act in the audio or video recording	0	0	0	1	1	0	0	1	0	2	1	0	0	2	0	8
83	Deliver instructions and training synchronously or asynchronously	0	0	1	0	0	0	0	0	0	0	2	0	0	0	0	3
84	Align business goals to instructional objectives	0	0	1	0	0	0	1	0	0	8	2	0	0	0	0	12

85	Identify the potentials and limitations of WBI	0	0	0	1	1	0	0	0	0	5	1	0	0	0	0	8
86	Get professional certification or recertification	0	0	0	0	0	0	0	0	1	0	1	1	0	1	1	5
87	Analyze the characteristics of the learning environment	0	0	0	0	1	0	0	0	0	0	0	0	2	0	0	3
88	Be sensitive to accessibility design	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	1
89	Adapt to criticism and changes without taking personally	0	1	1	0	0	0	1	0	0	0	0	0	2	1	0	6
90	Set an example by working hard	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	1
91	Update knowledge and skill set by going back to school for formal training	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	1
Total		109	78	73	106	95	110	52	91	64	112	80	106	116	80	82	1354

APPENDIX I MERGED DATA WITH LEVELS OF SUPPORT

Code/No			Skill Description	Skills Count															Skill Total	Cptcy Total	Domain Total
Dom#	Cptcy#	Skill#		#01	#02	#03	#04	#05	#06	#07	#08	#09	#10	#12	#13	#14	#15	#16			
A	A1-1	23	Write and edit text clearly, correctly and appropriately for the target audience	3	3	2	0	5	2	0	1	2	2	2	0	4	0	1	27		
A	A1-2	26	Communicate clearly and effectively in a language understood by developers	3	2	0	1	0	1	2	1	0	1	3	0	6	0	0	20		
A	A1-3	28	Ask the right questions to extract information from SMEs and stakeholders	1	3	0	3	3	3	2	1	3	0	0	4	0	1	0	24		
A	A1-4	61	Apply message design principles for screen design	0	2	0	1	0	2	0	2	1	1	2	1	2	0	0	14	108	359
A	A1-5	69	Listen well to understand and translate information for instruction	0	0	0	1	0	0	0	1	0	1	1	0	1	0	0	5		
A	A1-6	73	Negotiate with customers, vendors or stakeholders to manage expectations, goals and resources	0	0	0	0	1	2	0	1	0	0	0	0	1	1	1	7		
A	A1-7	74	Present in meetings	0	2	0	0	1	0	0	0	1	2	0	0	0	0	1	7		

A	A1-8	78	Sell ideas, proposals, or expertise to the management	0	0	0	0	0	0	0	2	0	0	0	1	0	1	0	4		
A	A2-1	24	Pay attention to details	1	2	0	0	0	0	0	0	0	0	1	0	1	0	0	5		
A	A2-2	29	Be patient	2	0	0	0	1	0	0	0	0	0	0	0	0	0	0	3		
A	A2-3	39	Respect others and treat them fair and professionally	1	0	1	0	3	5	0	2	0	5	2	1	0	0	1	21		
A	A2-4	70	Be passionate and enjoy your job	0	0	0	1	2	1	0	2	0	3	0	1	0	1	0	11	52	
A	A2-5	81	Self-motivated, committed and positive	0	0	0	0	0	0	0	0	0	0	2	0	2	0	1	5		
A	A2-6	89	Adapt to criticism and changes without taking personally	0	1	1	0	0	0	1	0	0	0	0	0	2	1	0	6		
A	A2-7	90	Set an example by working hard	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	1		

A	A3-1	22	Promote and apply instructional principles, theories, and research results to the instructional system design process	2	3	4	0	3	3	4	3	2	8	1	4	2	2	2	43	57	
A	A3-2	44	Read widely on professional discussions and publications	1	2	1	1	0	2	0	2	0	0	1	2	1	1	0	14		
A	A4-1	27	Be creative and innovative	1	0	0	3	1	0	1	1	1	1	0	4	7	1	0	21	115	
A	A4-2	30	Study the knowledge of the subject matter with interest and curiosity	1	2	0	1	0	0	0	0	0	0	0	0	2	1	0	7		
A	A4-3	38	Maintain good computer skills in general	2	2	2	2	0	1	2	1	2	4	0	0	0	1	1	20		
A	A4-4	40	Learn and try out emerging technologies and methodologies, be open minded	1	0	1	4	2	3	1	2	3	5	0	4	1	4	2	33		
A	A4-5	43	Join professional organizations and social groups and attend the meetings and events, physically or virtually	1	1	2	2	2	3	0	1	1	1	2	2	2	1	1	22		
A	A4-6	45	Network regularly with other processionals	0	0	2	1	1	0	0	0	0	1	0	1	0	0	0	6		

A	A4-7	86	Get professional certification or recertification	0	0	0	0	0	0	0	0	1	0	1	1	0	1	1	5		
A	A4-8	91	Update knowledge and skill set by going back to school for formal training	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	1		
A	A5-1	68	Keep proprietary information confidential and follow the required procedures	0	0	0	2	0	0	0	0	0	0	0	0	0	0	0	2	4	
A	A5-2	79	Comply with participating employee's union regulations and policies	0	0	0	0	0	0	0	0	0	0	0	2	0	0	0	2		
A	A6-1	51	Work on multiple projects at a time	0	2	0	0	0	1	0	0	1	0	0	0	0	0	2	6	23	
A	A6-2	71	Work with the combined roles of project manager, instructional designer, instructional developer in a given project	0	0	1	3	2	0	4	0	2	2	0	2	0	1	0	17		
B	B1-1	1	Analyze the given data (needs analysis, course requirements, performance analysis, existing content etc.) from customers or stakeholders	2	2	0	0	1	0	1	1	1	3	4	0	2	1	0	18	46	207
B	B1-2	54	Identify the needs and performance gap	0	1	3	1	2	0	0	2	1	1	1	0	1	2	1	16		

B	B1-3	84	Align business goals to instructional objectives	0	0	1	0	0	0	1	0	0	8	2	0	0	0	0	12			
B	B2-1	21	Collect, understand and analyze learner characteristics	2	2	0	1	1	0	1	4	2	1	0	4	0	1	0	19	22		
B	B2-2	87	Analyze the characteristics of the learning environment	0	0	0	0	1	0	0	0	0	0	0	0	2	0	0	3			
B	B3-1	10	Undertake content research and analysis utilizing existing or public resources	1	1	2	2	2	1	2	2	1	2	1	2	1	2	0	22	58		
B	B3-2	32	Conduct focus group to assist task analysis	2	0	0	0	0	0	0	1	0	0	0	0	0	0	0	3			
B	B3-3	33	Chunk or sequence instructional content for a course	2	1	0	3	0	2	0	1	2	0	0	1	2	1	1	16			
B	B3-4	47	Observe and analyze master performers to assist task analysis	0	2	0	2	0	0	0	1	1	0	0	1	0	1	0	8			
B	B3-5	59	Organize a set of related content into a curriculum or program	2	0	0	0	1	0	0	1	0	1	0	0	1	0	3	9			

B	B4-1	37	Identify the capabilities of commonly available software and tools	2	1	0	2	1	2	1	4	1	2	1	0	5	0	0	22	81		
B	B4-2	49	Determine appropriate technique, technology, and media to support learning objectives and strategies	0	1	1	2	4	1	0	3	4	3	0	5	4	2	3	33			
B	B4-3	67	Evaluate and determine appropriate tools for design and development	0	0	0	3	1	2	2	0	0	0	2	3	3	2	0	18			
B	B4-4	85	Identify the potentials and limitations of WBI	0	0	0	1	1	0	0	0	0	5	1	0	0	0	0	8			
C	C1-1	2	Create relevant learning objectives and corresponding instructional strategies	4	4	0	0	1	1	2	2	0	1	1	2	6	4	5	33	88	360	
C	C1-2	16	Design and develop appropriate interactivity or instructional activities to allow learners to practice, apply, and engage	2	3	1	4	0	3	0	1	2	1	1	4	5	0	0	27			
C	C1-3	17	Design visually appealing instructional materials	2	0	0	1	0	1	2	0	1	3	0	1	2	0	0	13			
C	C1-4	18	Add interesting and fun elements to the learning experience	2	0	0	4	2	1	0	0	0	0	0	3	3	0	0	15			

C	C2-1	4	Develop and utilize testing and review strategies for quality control	5	6	2	2	1	2	1	1	2	0	4	0	1	3	1	31			
C	C2-2	5	Create storyboards with descriptions for graphics, audio, video, interaction, and simulation, as well as audio scripts	4	2	2	4	2	1	0	1	2	1	1	0	4	2	1	27	81		
C	C2-3	55	Write design documents	2	1	1	2	3	2	1	2	2	2	1	1	1	1	1	23			
C	C3-1	3	Ensure the interface is created and compatible with other media elements	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2			
C	C3-2	7	Revise as necessary based on the feedback from customer(s) or sample audience	4	4	2	2	1	1	0	0	2	1	1	0	3	2	3	26			
C	C3-3	8	Create a prototype to communicate the look and feel and/or basic functionality	1	1	0	0	1	1	0	0	0	0	0	4	0	0	1	9	118		
C	C3-4	62	Create and edit graphics and other non-multimedia instructional materials	0	0	2	1	2	0	2	1	1	4	3	3	4	6	1	30			
C	C3-5	63	Produce and edit animation, video and audio web materials	0	0	0	6	2	0	2	2	1	4	0	4	2	4	1	28			

C	C3-6	64	Do programming or coding with computer languages	0	0	1	5	0	0	2	1	0	3	1	0	0	2	0	15			
C	C3-7	82	Direct, monitor or act in the audio or video recording	0	0	0	1	1	0	0	1	0	2	1	0	0	2	0	8			
C	C4-1	12	Validate content or strategies by formative or summative evaluation or both with sample audience onsite or remotely	5	0	2	1	1	0	1	1	1	1	3	1	1	4	2	24			
C	C4-2	14	Develop and implement level 1 and/or level 2 evaluation plans	3	2	4	0	2	2	1	2	2	0	1	0	1	3	2	25			
C	C4-3	46	Develop and implement level 3 and/or level 4 evaluation plans	0	1	0	2	0	0	0	1	0	1	0	2	0	1	0	8	63		
C	C4-4	76	Run statistic research and analysis on the collected evaluation data	0	0	0	0	0	0	0	1	0	1	0	0	1	0	0	3			
C	C4-5	77	Recommend other instructional or non-instructional interventions using the evaluation data	0	0	0	0	0	0	0	1	0	1	0	0	1	0	0	3			
C	C5-1	53	Ensure the instructional content is appropriate in language and culture for global audience and translation	0	2	1	0	1	1	0	0	0	2	0	0	0	0	2	9	10		

C	C5-2	88	Be sensitive to accessibility design	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	1		
D	D1-1	13	Deliver and implement the end product (to the customer) in a format or platform appropriate for the learning and management environment	3	0	0	4	1	2	3	1	2	1	2	2	2	2	1	26		
D	D1-2	56	Understand and utilize LMS or other implementation environment for implementation, training management and possibly performance improvement recommendation	0	0	2	0	1	4	1	3	0	2	0	0	1	2	0	16		
D	D1-3	57	Set up and schedule training sessions	0	0	2	0	0	0	0	0	1	0	0	0	0	0	0	3	56	
D	D1-4	58	Administrate registration process	0	0	3	1	0	0	0	0	0	0	0	0	0	0	0	4		428
D	D1-5	75	Facilitate training sessions	0	0	0	0	0	0	0	0	2	0	2	0	0	0	0	4		
D	D1-6	83	Deliver instructions and training synchronously or asynchronously	0	0	1	0	0	0	0	0	0	0	2	0	0	0	0	3		
D	D2-1	19	Manage budget	1	1	2	1	0	4	0	0	0	0	0	1	0	0	1	11	201	

D	D2-2	25	Lead, manage, and coordinate with team members	10	1	4	1	2	10	0	7	3	2	4	4	8	1	4	61		
D	D2-3	31	Support and coordinate with the project manager/ manager	2	1	0	1	1	1	0	2	0	0	0	0	0	0	0	8		
D	D2-4	34	Plan and stage a sign-off or buy-in process with the customer/stakeholders	1	2	0	1	4	3	0	2	0	2	0	2	1	3	6	27		
D	D2-5	35	Select and partner with the vendor or get support from another team	1	0	3	2	4	6	0	3	0	1	0	1	0	0	1	22		
D	D2-6	36	Keep track and report on project progress	2	1	2	1	0	3	0	1	1	1	2	4	1	1	3	23		
D	D2-7	50	Manage time efficiently	1	2	2	2	2	6	0	1	1	4	1	2	3	1	3	31		
D	D2-8	52	Organize and archive documents and other materials	1	0	0	0	1	1	0	0	1	0	0	0	1	0	0	5		
D	D2-9	72	Create project plans	0	0	0	0	2	1	0	0	0	0	0	2	0	1	5	11		

D	D2-10	80	Recruit and allocate human resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2		
D	D3-1	6	Educate, mentor and provide documentations to the team or other related staff about the right procedure	2	1	0	0	3	1	0	0	0	0	0	0	0	1	0	8	76	
D	D3-2	15	Create efficient workflow and platform for internal and external collaboration	4	1	1	3	1	1	1	2	2	5	3	0	3	0	2	29		
D	D3-3	20	Provide operational templates, other technical specifications, standards, and repository to achieve efficiency and consistency within the team	5	2	0	0	2	1	3	2	0	0	1	0	2	1	0	19		
D	D3-4	48	Work with remote team members, SMEs, and customers/vendors/stakeholders	0	1	1	3	0	2	0	3	0	0	0	0	1	0	3	14		
D	D3-5	65	Collect, establish and disseminate lessons learned and best practices within the team or for one's future work	1	1	2	1	1	0	0	0	0	0	0	0	0	0	0	6		
D	D4-1	9	Accommodate customer's or stakeholder's needs, schedule, style, and culture	2	0	0	3	2	2	0	0	1	2	6	4	0	1	1	24	80	
D	D4-2	11	Build and maintain effective relationship with SMEs, customers or stakeholders, including managing difficult SMEs, customers or stakeholders	2	1	2	4	4	6	1	0	0	0	8	8	1	0	3	40		

D	D4-3	42	Educate SMEs and customers/vendors/stakeholders	0	0	1	1	2	1	1	0	0	0	0	4	1	2	3	16		
D	D5-1	41	Understand the overall business process and objectives	1	0	0	0	0	1	3	2	1	0	1	0	0	0	1	10		
D	D5-2	60	Write training/business proposals	1	0	0	0	0	0	0	0	0	0	0	0	0	0	1	2	15	
D	D5-3	66	Benchmark other organizations	0	0	1	0	0	1	0	1	0	0	0	0	0	0	0	3		
				109	79	71	107	95	110	52	91	64	112	80	106	116	80	82	1354	1354	1354

APPENDIX J THE COMPETENCY SURVEY AT ZOOMERANG

Competencies for Expert Instructional Designers in WBI

Welcome to My Survey!

This survey has 13 questions, takes 5-10 minutes.

Yonghui Chen

Aka Susan Chen

Wayne State University

Start

Questions marked with an asterisk (*) are mandatory.

---

1. * **Research Informed Consent**

Purpose
In this research study, the researcher is to identify and rate the competencies for expert instructional designers who specialize in Web Based Instruction.

Study Procedures
If you take part in the study, you will be asked questions concerning your opinions on instructional competencies. The survey will be anonymous, unless you are willing to give your name and other personal information.
- You will be asked to rate the importance of each listed competency. Those competencies have been compiled out of the preceding interview results.
- You are encouraged to answer all questions. However, you have the option of not answering some of the questions and remaining in the study.

Benefits
As a participant in this research study, there will be no direct benefit for you; however, information from this study may benefit other people and society now or in the future.

Risks
There are no known risks at this time to participation in this study.

Study Costs
Participation in this study will be of no cost to you.

Compensation
You will not be paid for taking part in this study.

Confidentiality
All information collected about you during the course of this study will be kept confidential to the extent permitted by law. You will be identified in the research records by a code name or number. Information that identifies you personally will not be released without your written permission. However, the study sponsor, the Institutional Review Board at Wayne State University, or federal agencies with appropriate regulatory oversight [e.g., Food and Drug Administration, Office for Human Research Protections, Office of Civil Rights etc. may review your records.

When the results of this research are published or discussed in conferences, no information will be included that would reveal your identity.

You will be identified in the research records by a code name or number, if you choose to identify yourself during the survey.

Voluntary Participation/Withdrawal
Taking part in this study is voluntary. You have the right to choose not to take part in this study. If you decide to take part in the study you can later change your mind and withdraw from the study. You are free to only answer questions that you want to answer. You are free to withdraw from participation in this study at any time. Your decisions will not change any present or future relationship with Wayne State University or its affiliates, or other services you are entitled to receive.

The researcher may stop your participation in this study without your consent. The researcher will make the decision and let you know if it is not possible for you to continue. The decision that is made is to protect your health and safety, or because you did not follow the instructions to take part in the study.

Questions
If you have any questions about this study now or in the future, you may contact Yonghui Chen or one of her research advisers at the following phone number 248-935-7946 or 313-577- 1700. If you have questions or concerns about your rights as a research participant, the Chair of the Human Investigation Committee can be contacted at (313) 577-1628. If you are unable to contact the research staff, or if you want to talk to someone other than the research staff, you may also call (313) 577-1628 to ask questions or voice concerns or complaints.

I agree to participate in this survey

I do not agree to participate in this survey

Submit

Questions marked with an asterisk (*) are mandatory.

2. * Are you an instructional designer who was or is working in the Web Based
Instruction (WBI) field, with a U.S.A. based business or employment?

Yes

No

3. * Did you take this survey before? Or, were you in the interview group of this research?

Yes

No

Submit

4. What's your current job title?

5. What's your age range?

   25-35

   36-45

   46-55

   55 above

6. Your gender:

   Male

   Female

7. The nature of the organization/business you are current working for:

   Business/Industry

   Education

   Government/Military

   Health Care

   Independent Consultant

   Other

8. What's your highest education level?

   Bachelor's

   Master's

   Doctorate

   Not applicable

9. What's the major of your last degree?

Submit

10. How many years have you worked in web based instruction as an instructional designer? (User numeric number only)

11. How many employees are there in your organization?

<100

101-500

501-1,000

1,001-2,500

2,501-10,000

>10,000

Submit

12. Below is the list of competencies a typical expert WBI instructional designer has. Apply your perception of expectations for such experts. It is important to focus on the **expertise needed for Web Based Instruction.**

Use the scale of 1-5 to indicate the level of importance. Select only one level for each competency.

	Not Important	Slightly Important	Important	Very Important	Most Important
Communicate effectively, in visual, oral, and written formats	1	2	3	4	5
Build trust with others by acting positively, respectfully, and diligently	1	2	3	4	5
Apply research results and instructional theories to the practice of Web-based instructional design	1	2	3	4	5
Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction	1	2	3	4	5
Identify and comply with legal, ethical, and regulatory requirements	1	2	3	4	5
Successfully complete multiple tasks and responsibilities	1	2	3	4	5
Conduct a needs assessment pertinent to the goals of the Web-based instruction	1	2	3	4	5
Analyze the characteristics of the target audience	1	2	3	4	5
Conduct task analysis and content analysis	1	2	3	4	5
Analyze the characteristics of available technologies and tools for the Web-based instruction project	1	2	3	4	5
Determine appropriate instructional strategies and techniques	1	2	3	4	5
Design instructional materials for development	1	2	3	4	5
Develop instructional materials	1	2	3	4	5
Evaluate and assess the Web-based instruction and its impact	1	2	3	4	5
Design instruction to be appropriate for global usage	1	2	3	4	5

Deliver and implement end products	1	2	3	4	5
Plan and implement assignments and resources to achieve project goals	1	2	3	4	5
Promote efficiency and effectiveness for internal and external collaboration	1	2	3	4	5
Manage relationship with Subject Matter Experts (SMEs), customers, or stakeholders	1	2	3	4	5
Apply business acumen to build a business case for the organization's instructional programs	1	2	3	4	5

Submit

13. This is the end of the survey. If you wish to receive the results of this research, please provide your email below.

Please also use this field to provide any additional information you have for us. Thanks!

Submit

APPENDIX K-1 COMPETENCIES AND PERFORMANCE STATEMENTS BY BUSINESS SETTINGS

(N=15)

Competency	Business Setting									
	Gov/Mil		Bus/Ind		Edu		Hlthcr		Indpdt	
	L.S.	%	L.S.	%	L.S.	%	L.S.	%	L.S.	%
Professional Foundations										
1. Communicate effectively, in visual, oral, and written formats										
• Write and edit text clearly, correctly and appropriately for the target audience	3	11	18	67	2	7	4	15	0	0
• Communicate clearly and effectively in a language understood by developers	3	15	7	35	3	15	6	30	1	5
• Ask the right questions to extract information from SMEs and stakeholders	1	4	20	83	0	0	0	0	3	13
• Apply message design principles for screen design	0	0	9	64	2	14	2	14	1	7
• Listen well to understand and translate information for instruction	0	0	2	40	1	20	1	20	1	20
• Negotiate with customers, vendors or stakeholders to manage expectations, goals and resources	0	0	6	86	0	0	1	14	0	0
• Present in meetings	0	0	7	100	0	0	0	0	0	0
• Sell ideas, proposals, or expertise to the management	0	0	4	100	0	0	0	0	0	0
2. Build trust with others by acting positively, respectfully, and diligently										
• Pay attention to details	1	20	2	40	1	20	1	20	0	0
• Be patient	2	67	1	33	0	0	0	0	0	0
• Respect others and treat them fair and professionally	1	5	18	86	2	10	0	0	0	0

• Be passionate and enjoy your job	0	0	10	91	0	0	0	0	1	9
• Self-motivated, committed and positive	0	0	1	20	2	40	2	40	0	0
• Adapt to criticism and changes without taking personally	0	0	4	67	0	0	2	33	0	0
• Set an example by working hard	0	0	1	100	0	0	0	0	0	0
3. Apply research results and instructional theories to the practice of Web-based instructional design										
• Promote and apply instructional principles, theories, and research results to the instructional system design process	2	5	38	88	1	2	2	5	0	0
• Read widely on professional discussions and publications	1	7	10	71	1	7	1	7	1	7
4. Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction										
• Be creative and innovative	1	5	10	48	0	0	7	33	3	14
• Study the knowledge of the subject matter with interest and curiosity	1	14	3	43	0	0	2	29	1	14
• Maintain good computer skills in general	2	10	16	80	0	0	0	0	2	10
• Learn and try out emerging technologies and methodologies, be open minded	1	3	27	82	0	0	1	3	4	12
• Join professional organizations and social groups and attend the meetings and events, physically or virtually	1	5	15	68	2	9	2	9	2	9
• Network regularly with other processionals	0	0	5	83	0	0	0	0	1	17
• Get professional certification or recertification	0	0	4	80	1	20	0	0	0	0

• Update knowledge and skill set by going back to school for formal training	0	0	1	100	0	0	0	0	0	0
5. Identify and comply with legal, ethical, and regulatory requirements										
• Keep proprietary information confidential and follow the required procedures	0	0	0	0	0	0	0	0	2	100
• Comply with participating employee's union regulations and policies	0	0	2	100	0	0	0	0	0	0
6. Successfully complete multiple tasks and responsibilities										
• Work on multiple projects at a time	0	0	6	100	0	0	0	0	0	0
• Work with the combined roles of project manager, instructional designer, instructional developer in a given project	0	0	14	82	0	0	0	0	3	18
Planning & Analysis										
7. Conduct a needs assessment pertinent to the goals of the Web-based instruction										
• Analyze the given data (needs analysis, course requirements, performance analysis, existing content etc.) from customers or stakeholder	2	11	10	56	4	22	2	11	0	0
• Identify the needs and performance gap	0	0	13	81	1	6	1	6	1	6
• Align business goals to instructional objectives	0	0	10	83	2	17	0	0	0	0
8. Analyze the characteristics of the target audience										
• Collect, understand and analyze learner characteristics	2	11	16	84	0	0	0	0	1	5
• Analyze the characteristics of the learning environment	0	0	1	33	0	0	2	67	0	0

9. Conduct task analysis and content analysis										
• Undertake content research and analysis utilizing existing or public resources	1	5	17	77	1	5	1	5	2	9
• Conduct focus group to assist task analysis	2	67	1	33	0	0	0	0	0	0
• Chunk or sequence instructional content for a course	2	13	9	56	0	0	2	13	3	19
• Observe and analyze master performers to assist task analysis	0	0	6	75	0	0	0	0	2	25
• Organize a set of related content into a curriculum or program	2	22	6	67	0	0	1	11	0	0
10. Analyze the characteristics of available technologies and tools for the Web-based instruction project										
• Identify the capabilities of commonly available software and tools	2	9	12	55	1	5	5	23	2	9
• Determine appropriate technique, technology, and media to support learning objectives and strategies	0	0	27	82	0	0	4	12	2	6
• Evaluate and determine appropriate tools for design and development	0	0	10	56	2	11	3	17	3	17
• Identify the potentials and limitations of WBI	0	0	6	75	1	13	0	0	1	13
Design & Development										
11. Determine appropriate instructional strategies and techniques										
• Create relevant learning objectives and corresponding instructional strategies	4	12	22	67	1	3	6	18	0	0
• Design and develop appropriate interactivity or instructional activities to allow learners to practice, apply, and engage	2	7	15	56	1	4	5	19	4	15

• Design visually appealing instructional materials	2	15	8	62	0	0	2	15	1	8
• Add interesting and fun elements to the learning experience	2	13	6	40	0	0	3	20	4	27
12. Design instructional materials for development										
• Develop and utilize testing and review strategies for quality control	5	16	19	61	4	13	1	3	2	6
• Create storyboards with descriptions for graphics, audio, video, interaction, and simulation, as well as audio scripts	4	15	14	52	1	4	4	15	4	15
• Write design documents	2	9	17	74	1	4	1	4	2	9
13. Develop instructional materials										
• Ensure the interface is created and compatible with other media elements	2	100	0	0	0	0	0	0	0	0
• Revise as necessary based on the feedback from customer(s) or sample audience	4	15	16	62	1	4	3	12	2	8
• Create a prototype to communicate the look and feel and/or basic functionality	1	11	8	89	0	0	0	0	0	0
• Create and edit graphics and other non-multimedia instructional materials	0	0	22	73	3	10	4	13	1	3
• Produce and edit animation, video and audio Web materials	0	0	20	71	0	0	2	7	6	21
• Do programming or coding with computer languages	0	0	9	60	1	7	0	0	5	33
• Direct, monitor or act in the audio or video recording	0	0	6	75	1	13	0	0	1	13
14. Evaluate and assess the Web-based instruction and its impact										
• Validate content or strategies by formative or summative	5	21	14	58	3	13	1	4	1	4

evaluation or both with sample audience onsite or remotely										
• Develop and implement level 1 and/or level 2 evaluation plans	3	12	20	80	1	4	1	4	0	0
• Develop and implement level 3 and/or level 4 evaluation plans	0	0	6	75	0	0	0	0	2	25
• Run statistic research and analysis on the collected evaluation data	0	0	2	67	0	0	1	33	0	0
• Recommend other instructional or non-instructional interventions using the evaluation data	0	0	2	67	0	0	1	33	0	0
15. Design instruction to be appropriate for global usage										
• Ensure the instructional content is appropriate in language and culture for global audience and translation	0	0	9	100	0	0	0	0	0	0
• Be sensitive to accessibility design	0	0	0	0	0	0	1	100	0	0
Implementation & Management										
16. Deliver and implement end products										
• Deliver and implement the end product (to the customer) in a format or platform appropriate for the learning and management environment	3	12	15	58	2	8	2	8	4	15
• Understand and utilize LMS or other implementation environment for implementation, training management and possibly performance improvement recommendation	0	0	15	94	0	0	1	6	0	0

• Set up and schedule training sessions	0	0	3	100	0	0	0	0	0	0
• Administrate registration process	0	0	3	75	0	0	0	0	1	25
• Facilitate training sessions	0	0	2	50	2	50	0	0	0	0
• Deliver instructions and training synchronously or asynchronously	0	0	1	33	2	67	0	0	0	0
17. Plan and implement assignments and resources to achieve project goals										
• Manage budget	1	9	9	82	0	0	0	0	1	9
• Lead, manage, and coordinate with team members	10	16	38	62	4	7	8	13	1	2
• Support and coordinate with the project manager/ manager	2	25	5	63	0	0	0	0	1	13
• Plan and stage a sign-off or buy-in process with the customer/stakeholders	1	4	24	89	0	0	1	4	1	4
• Select and partner with the vendor or get support from another team	1	5	19	86	0	0	0	0	2	9
• Keep track and report on project progress	2	9	17	74	2	9	1	4	1	4
• Manage time efficiently	1	3	24	77	1	3	3	10	2	6
• Organize and archive documents and other materials	1	20	3	60	0	0	1	20	0	0
• Create project plans	0	0	11	100	0	0	0	0	0	0
• Recruit and allocate human resources	0	0	2	100	0	0	0	0	0	0
18. Promote efficiency and effectiveness for internal and external collaboration										
• Educate, mentor and provide documentations to the team or other related staff about the right procedure	2	25	6	75	0	0	0	0	0	0
• Create efficient workflow and platform for internal and external	4	14	16	55	3	10	3	10	3	10

collaboration										
• Provide operational templates, other technical specifications, standards, and repository to achieve efficiency and consistency within the team	5	26	11	58	1	5	2	11	0	0
• Work with remote team members, SMEs, and customers/vendors/stakeholders	0	0	10	71	0	0	1	7	3	21
• Collect, establish and disseminate lessons learned and best practices within the team or for one's future work	1	17	4	67	0	0	0	0	1	17
19. Manage relationship with Subject Matter Experts (SMEs), customers, or stakeholders										
• Accommodate customer's or stakeholder's needs, schedule, style, and culture	2	8	13	54	6	25	0	0	3	13
• Build and maintain effective relationship with SMEs, customers or stakeholders, including managing difficult SMEs, customers or stakeholders	2	5	25	63	8	20	1	3	4	10
• Educate SMEs and customers/vendors/stakeholders	0	0	14	88	0	0	1	6	1	6
20. Apply business acumen to build a business case for the organization's instructional programs										
• Understand the overall business process and objectives	1	10	8	80	1	10	0	0	0	0
• Write training/business proposals	1	50	1	50	0	0	0	0	0	0
• Benchmark other organizations	0	0	3	100	0	0	0	0	0	0

APPENDIX K-2 COMPETENCIES AND PERFORMANCE STATEMENTS BY BUSINESS SIZE

(N=15)

Competency	Business Size					
	Large		Medium		Small	
	L.S.	%	L.S.	%	L.S.	%
Professional Foundations						
1. Communicate effectively, in visual, oral, and written formats						
• Write and edit text clearly, correctly and appropriately for the target audience	17	63	7	26	3	11
• Communicate clearly and effectively in a language understood by developers	11	55	630		3	15
• Ask the right questions to extract information from SMEs and stakeholders	10	42	8	33	6	25
• Apply message design principles for screen design	6	43	5	36	3	21
• Listen well to understand and translate information for instruction	3	60	1	20	1	20
• Negotiate with customers, vendors or stakeholders to manage expectations, goals and resources	4	57	3	43	0	0
• Present in meetings	3	43	2	29	2	29
• Sell ideas, proposals, or expertise to the management	4	100	0	0	0	0
2. Build trust with others by acting positively, respectfully, and diligently						
• Pay attention to details	2	40	1	20	2	40
• Be patient	3	100	0	0	0	0
• Respect others and treat them fair and professionally	13	62	8	38	0	0
• Be passionate and enjoy your job	9	82	1	9	1	9
• Self-motivated, committed and positive	2	40	3	60	0	0
• Adapt to criticism and changes without taking personally	4	67	1	17	1	17
• Set an example by working	1	100	0	0	0	0

hard						
3. Apply research results and instructional theories to the practice of Web-based instructional design						
• Promote and apply instructional principles, theories, and research results to the instructional system design process	28	65	12	28	3	7
• Read widely on professional discussions and publications	8	57	3	21	3	21
4. Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction						
• Be creative and innovative	16	76	2	10	3	14
• Study the knowledge of the subject matter with interest and curiosity	4	57	0	0	3	43
• Maintain good computer skills in general	10	50	6	30	4	20
• Learn and try out emerging technologies and methodologies, be open minded	20	61	9	27	4	12
• Join professional organizations and social groups and attend the meetings and events, physically or virtually	12	55	7	32	3	14
• Network regularly with other processionals	3	83	0	0	1	17
• Get professional certification or recertification	2	40	3	60	0	0
• Update knowledge and skill set by going back to school for formal training	1	100	0	0	0	0
5. Identify and comply with legal, ethical, and regulatory requirements						
• Keep proprietary information confidential and follow the required procedures	0	0	0	0	2	100
• Comply with participating employee's union regulations and policies	2	100	0	0	0	0
6. Successfully complete multiple tasks and responsibilities						

• Work on multiple projects at a time	0	0	4	67	2	33
• Work with the combined roles of project manager, instructional designer, instructional developer in a given project	8	47	6	35	3	18
Planning & Analysis						
7. Conduct a needs assessment pertinent to the goals of the Web-based instruction						
• Analyze the given data (needs analysis, course requirements, performance analysis, existing content etc.) from customers or stakeholder	10	56	6	33	2	11
• Identify the needs and performance gap	11	69	3	19	2	13
• Align business goals to instructional objectives	9	75	3	25	0	0
8. Analyze the characteristics of the target audience						
• Collect, understand and analyze learner characteristics	13	68	3	16	3	16
• Analyze the characteristics of the learning environment	3	100	0	0	0	0
9. Conduct task analysis and content analysis						
• Undertake content research and analysis utilizing existing or public resources	14	64	5	23	3	14
• Conduct focus group to assist task analysis	3	100	0	0	0	0
• Chunk or sequence instructional content for a course	7	44	5	31	4	25
• Observe and analyze master performers to assist task analysis	3	38	1	13	4	50
• Organize a set of related content into a curriculum or program	6	67	3	33	0	0
10. Analyze the characteristics of available technologies and tools for the Web-based instruction project						
• Identify the capabilities of commonly available software and tools	14	64	5	23	3	14

• Determine appropriate technique, technology, and media to support learning objectives and strategies	22	67	3	33	0	0
• Evaluate and determine appropriate tools for design and development	9	50	6	33	3	17
• Identify the potentials and limitations of WBI	6	75	1	13	1	15
Design & Development						
11. Determine appropriate instructional strategies and techniques						
• Create relevant learning objectives and corresponding instructional strategies	20	61	9	27	4	12
• Design and develop appropriate interactivity or instructional activities to allow learners to practice, apply, and engage	14	52	6	22	7	26
• Design visually appealing instructional materials	8	62	4	31	1	8
• Add interesting and fun elements to the learning experience	10	67	1	7	4	27
12. Design instructional materials for development						
• Develop and utilize testing and review strategies for quality control	13	42	10	32	8	26
• Create storyboards with descriptions for graphics, audio, video, interaction, and simulation, as well as audio scripts	16	59	5	19	6	22
• Write design documents	13	57	7	30	3	13
13. Develop instructional materials						
• Ensure the interface is created and compatible with other media elements	2	100	0	0	0	0
• Revise as necessary based on the feedback from customer(s) or sample audience	13	50	7	27	6	23
• Create a prototype to communicate the look and feel and/or basic functionality	6	67	2	22	1	11

• Create and edit graphics and other non-multimedia instructional materials	22	73	7	23	1	3
• Produce and edit animation, video and audio Web materials	18	64	4	14	6	21
• Do programming or coding with computer languages	7	47	3	20	5	33
• Direct, monitor or act in the audio or video recording	6	75	1	13	1	13
14. Evaluate and assess the Web-based instruction and its impact						
• Validate content or strategies by formative or summative evaluation or both with sample audience onsite or remotely	16	67	7	29	1	4
• Develop and implement level 1 and/or level 2 evaluation plans	15	60	8	32	2	8
• Develop and implement level 3 and/or level 4 evaluation plans	5	63	0	0	3	38
• Run statistic research and analysis on the collected evaluation data	3	100	0	0	0	0
• Recommend other instructional or non-instructional interventions using the evaluation data	3	100	0	0	0	0
15. Design instruction to be appropriate for global usage						
• Ensure the instructional content is appropriate in language and culture for global audience and translation	4	44	3	33	2	22
• Be sensitive to accessibility design	1	100	0	0	0	0
Implementation & Management						
16. Deliver and implement end products						
• Deliver and implement the end product (to the customer) in a format or platform appropriate for the learning and management environment	12	46	10	38	4	15
• Understand and utilize LMS or other implementation	11	69	5	31	0	0

environment for implementation, training management and possibly performance improvement recommendation						
• Set up and schedule training sessions	2	67	1	33	0	0
• Administrate registration process	3	75	0	0	1	25
• Facilitate training sessions	0	0	4	100	0	0
• Deliver instructions and training synchronously or asynchronously	1	33	2	67	0	0
17. Plan and implement assignments and resources to achieve project goals						
• Manage budget	4	36	5	45	2	18
• Lead, manage, and coordinate with team members	38	62	21	34	2	3
• Support and coordinate with the project manager/ manager	5	63	1	13	2	25
• Plan and stage a sign-off or buy-in process with the customer/stakeholders	15	56	9	33	3	11
• Select and partner with the vendor or get support from another team	13	59	7	32	2	9
• Keep track and report on project progress	12	52	9	39	2	9
• Manage time efficiently	16	52	11	35	4	13
• Organize and archive documents and other materials	3	60	2	40	0	0
• Create project plans	5	45	6	55	0	0
• Recruit and allocate human resources	0	0	2	100	0	0
18. Promote efficiency and effectiveness for internal and external collaboration						
• Educate, mentor and provide documentations to the team or other related staff about the right procedure	6	75	1	13	1	13
• Create efficient workflow and platform for internal and external collaboration	16	55	9	31	4	14
• Provide operational templates, other technical	12	63	5	26	2	11

specifications, standards, and repository to achieve efficiency and consistency within the team						
• Work with remote team members, SMEs and customers/vendors/stakeholders	5	36	5	36	4	29
• Collect, establish and disseminate lessons learned and best practices within the team or for one's future work	4	67	0	0	2	33
19. Manage relationship with Subject Matter Experts (SMEs), customers, or stakeholders						
• Accommodate customer's or stakeholder's needs, schedule, style, and culture	11	46	10	42	3	13
• Build and maintain effective relationship with SMEs, customers or stakeholders, including managing difficult SMEs, customers or stakeholders	17	43	18	45	5	13
• Educate SMEs and customers/vendors/stakeholders	10	63	5	31	1	6
20. Apply business acumen to build a business case for the organization's instructional programs						
• Understand the overall business process and objectives	3	30	7	70	0	0
• Write training/business proposals	1	50	1	50	0	0
• Benchmark other organizations	2	67	1	33	0	0

APPENDIX K-3 COMPETENCIES AND PERFORMANCE STATEMENTS BY PROJECT TEAM SIZE

(N=15)

Competency	Project Team Size					
	Big		Medium		Small/Solo	
	L.S.	%	L.S.	%	L.S.	%
Professional Foundations						
1. Communicate effectively, in visual, oral, and written formats						
• Write and edit text clearly, correctly and appropriately for the target audience	8	30	14	52	5	19
• Communicate clearly and effectively in a language understood by developers	4	20	13	65	3	15
• Ask the right questions to extract information from SMEs and stakeholders	4	17	11	46	9	38
• Apply message design principles for screen design	2	14	11	79	1	7
• Listen well to understand and translate information for instruction	1	20	3	60	1	20
• Negotiate with customers, vendors or stakeholders to manage expectations, goals and resources	1	14	4	57	2	29
• Present in meetings	4	57	2	29	1	14
• Sell ideas, proposals, or expertise to the management	0	0	3	75	1	25
2. Build trust with others by acting positively, respectfully, and diligently						
• Pay attention to details	1	20	4	80	0	0
• Be patient	2	67	0	0	1	33
• Respect others and treat them fair and professionally	7	33	11	52	3	14
• Be passionate and enjoy your job	3	27	4	36	4	36
• Self-motivated, committed and positive	1	20	4	80	0	0
• Adapt to criticism and changes without taking personally	0	0	4	67	2	33
• Set an example by working	0	0	1	100	0	0

hard						
3. Apply research results and instructional theories to the practice of Web-based instructional design						
• Promote and apply instructional principles, theories, and research results to the instructional system design process	14	33	20	47	9	21
• Read widely on professional discussions and publications	1	7	11	79	2	14
4. Update and improve professional knowledge, skills, and attitudes pertaining to Web-based instruction						
• Be creative and innovative	3	14	12	57	6	29
• Study the knowledge of the subject matter with interest and curiosity	1	14	12	57	2	29
• Maintain good computer skills in general	9	45	6	30	5	25
• Learn and try out emerging technologies and methodologies, be open minded	11	33	11	33	11	33
• Join professional organizations and social groups and attend the meetings and events, physically or virtually	4	18	13	59	5	23
• Network regularly with other processionals	1	17	3	50	2	33
• Get professional certification or recertification	2	40	2	40	1	20
• Update knowledge and skill set by going back to school for formal training	1	100	0	0	0	0
5. Identify and comply with legal, ethical, and regulatory requirements						
• Keep proprietary information confidential and follow the required procedures	0	0	0	0	2	100
• Comply with participating employee's union regulations and policies	0	0	2	100	0	0
6. Successfully complete multiple tasks and responsibilities						

• Work on multiple projects at a time	3	50	3	50	0	0
• Work with the combined roles of project manager, instructional designer, instructional developer in a given project	4	24	3	18	10	59
Planning & Analysis						
7. Conduct a needs assessment pertinent to the goals of the Web-based instruction						
• Analyze the given data (needs analysis, course requirements, performance analysis, existing content etc.) from customers or stakeholder	6	33	9	50	3	17
• Identify the needs and performance gap	3	19	8	50	5	31
• Align business goals to instructional objectives	8	67	3	25	1	8
8. Analyze the characteristics of the target audience						
• Collect, understand and analyze learner characteristics	5	26	10	53	4	21
• Analyze the characteristics of the learning environment	0	0	2	67	1	33
9. Conduct task analysis and content analysis						
• Undertake content research and analysis utilizing existing or public resources	4	18	10	45	8	36
• Conduct focus group to assist task analysis	2	67	1	33	0	0
• Chunk or sequence instructional content for a course	5	31	7	44	4	25
• Observe and analyze master performers to assist task analysis	1	13	4	50	3	38
• Organize a set of related content into a curriculum or program	6	67	2	22	1	11
10. Analyze the characteristics of available technologies and tools for the Web-based instruction project						
• Identify the capabilities of commonly available software and tools	5	23	13	59	4	18

• Determine appropriate technique, technology, and media to support learning objectives and strategies	10	30	15	45	8	23
• Evaluate and determine appropriate tools for design and development	0	0	10	56	8	44
• Identify the potentials and limitations of WBI	5	63	1	13	2	25
Design & Development						
11. Determine appropriate instructional strategies and techniques						
• Create relevant learning objectives and corresponding instructional strategies	10	30	16	48	7	21
• Design and develop appropriate interactivity or instructional activities to allow learners to practice, apply, and engage	5	19	18	67	4	15
• Design visually appealing instructional materials	6	46	4	31	3	23
• Add interesting and fun elements to the learning experience	2	13	7	47	6	40
12. Design instructional materials for development						
• Develop and utilize testing and review strategies for quality control	8	26	16	52	7	23
• Create storyboards with descriptions for graphics, audio, video, interaction, and simulation, as well as audio scripts	8	30	11	41	8	30
• Write design documents	7	30	9	39	7	30
13. Develop instructional materials						
• Ensure the interface is created and compatible with other media elements	2	100	0	0	0	0
• Revise as necessary based on the feedback from customer(s) or sample audience	10	38	11	42	5	19
• Create a prototype to communicate the look and feel and/or basic functionality	2	22	6	67	1	11

• Create and edit graphics and other non-multimedia instructional materials	6	20	13	43	11	37
• Produce and edit animation, video and audio Web materials	6	21	8	29	14	50
• Do programming or coding with computer languages	3	20	3	20	9	60
• Direct, monitor or act in the audio or video recording	2	25	2	25	4	50
14. Evaluate and assess the Web-based instruction and its impact						
• Validate content or strategies by formative or summative evaluation or both with sample audience onsite or remotely	9	38	8	33	7	29
• Develop and implement level 1 and/or level 2 evaluation plans	7	28	12	48	6	24
• Develop and implement level 3 and/or level 4 evaluation plans	1	13	4	50	3	38
• Run statistic research and analysis on the collected evaluation data	1	33	2	67	0	0
• Recommend other instructional or non-instructional interventions using the evaluation data	1	33	2	67	0	0
15. Design instruction to be appropriate for global usage						
• Ensure the instructional content is appropriate in language and culture for global audience and translation	4	44	4	44	1	11
• Be sensitive to accessibility design	0	0	1	100	0	0
Implementation & Management						
16. Deliver and implement end products						
• Deliver and implement the end product (to the customer) in a format or platform appropriate for the learning and management environment	7	27	9	35	10	38
• Understand and utilize LMS or other implementation	2	13	10	63	4	25

environment for implementation, training management and possibly performance improvement recommendation						
• Set up and schedule training sessions	1	33	2	67	0	0
• Administrate registration process	0	0	3	75	1	25
• Facilitate training sessions	2	50	2	50	0	0
• Deliver instructions and training synchronously or asynchronously	0	0	3	100	0	0
17. Plan and implement assignments and resources to achieve project goals						
• Manage budget	2	18	8	73	1	9
• Lead, manage, and coordinate with team members	19	31	38	62	4	7
• Support and coordinate with the project manager/ manager	2	25	4	50	2	25
• Plan and stage a sign-off or buy-in process with the customer/stakeholders	9	33	10	37	8	30
• Select and partner with the vendor or get support from another team	3	14	13	59	6	27
• Keep track and report on project progress	7	30	14	61	2	9
• Manage time efficiently	9	29	17	55	5	16
• Organize and archive documents and other materials	2	40	2	40	1	20
• Create project plans	5	45	3	27	3	27
• Recruit and allocate human resources	2	100	0	0	0	0
18. Promote efficiency and effectiveness for internal and external collaboration						
• Educate, mentor and provide documentations to the team or other related staff about the right procedure	2	25	2	25	4	50
• Create efficient workflow and platform for internal and external collaboration	13	45	11	38	5	17
• Provide operational templates, other technical	5	26	8	42	6	32

specifications, standards, and repository to achieve efficiency and consistency within the team						
• Work with remote team members, SMEs and customers/vendors/stakeholders	3	21	8	57	3	21
• Collect, establish and disseminate lessons learned and best practices within the team or for one's future work	1	17	3	50	2	33
19. Manage relationship with Subject Matter Experts (SMEs), customers, or stakeholders						
• Accommodate customer's or stakeholder's needs, schedule, style, and culture	6	25	12	50	6	25
• Build and maintain effective relationship with SMEs, customers or stakeholders, including managing difficult SMEs, customers or stakeholders	5	13	26	65	9	23
• Educate SMEs and customers/vendors/stakeholders	3	19	7	44	6	38
20. Apply business acumen to build a business case for the organization's instructional programs						
• Understand the overall business process and objectives	3	30	4	40	3	30
• Write training/business proposals	2	100	0	0	0	0
• Benchmark other organizations	0	0	3	100	0	0

APPENDIX L PERFORMANCE STATEMENTS FOR EXPERT INSTRUCTIONAL DESIGNERS IN WBI

1. Analyze the given data (needs analysis, course requirements, performance analysis, existing content etc.) from customers or stakeholders.
2. Create relevant learning objectives and corresponding instructional strategies.
3. Ensure the interface is created and compatible with other media elements.
4. Develop and utilize testing and review strategies for quality control.
5. Create storyboards with descriptions for graphics, audio, video, interaction, and simulation, as well as audio scripts.
6. Educate, mentor and provide documentations to the team or other related staff about the right procedure.
7. Revise as necessary based on the feedback from customer(s) or sample audience.
8. Create a prototype to communicate the look and feel and/or basic functionality.
9. Accommodate customer's or stakeholder's needs, schedule, style, and culture.
10. Undertake content research and analysis utilizing existing or public resources.
11. Build and maintain effective relationship with SMEs, customers or stakeholders, including managing difficult SMEs, customers or stakeholders.
12. Validate content or strategies by formative or summative evaluation or both with sample audience onsite or remotely.
13. Deliver and implement the end product (to the customer) in a format or platform appropriate for the learning and management environment.
14. Develop and implement level 1 and/or level 2 evaluation plans.
15. Create efficient workflow and platform for internal and external collaboration.
16. Design and develop appropriate interactivity or instructional activities to allow learners to practice, apply, and engage.
17. Design visually appealing instructional materials.
18. Add interesting and fun elements to the learning experience.
19. Manage budget.
20. Provide operational templates, other technical specifications, standards, and repository to achieve efficiency and consistency within the team.
21. Collect, understand and analyze learner characteristics.
22. Promote and apply instructional principles, theories, and research results to the instructional system design process.
23. Write and edit text clearly, correctly and appropriately for the target audience.
24. Pay attention to details.
25. Lead, manage, and coordinate with team members.
26. Communicate clearly and effectively in a language understood by developers.
27. Be creative and innovative.
28. Ask the right questions to extract information from SMEs and stakeholders.
29. Be patient.
30. Study the knowledge of the subject matter with interest and curiosity.
31. Support and coordinate with the project manager/ manager.
32. Conduct focus group to assist task analysis.

33. Chunk or sequence instructional content for a course.
34. Plan and stage a sign-off or buy-in process with the customer/stakeholders.
35. Select and partner with the vendor or get support from another team.
36. Keep track and report on project progress.
37. Identify the capabilities of commonly available software and tools.
38. Maintain good computer skills in general.
39. Respect others and treat them fair and professionally.
40. Learn and try out emerging technologies and methodologies, be open minded.
41. Understand the overall business process and objectives.
42. Educate SMEs and customers/vendors/stakeholders.
43. Join professional organizations and social groups and attend the meetings and events, physically or virtually.
44. Read widely on professional discussions and publications.
45. Network regularly with other professionals.
46. Develop and implement level 3 and/or level 4 evaluation plans.
47. Observe and analyze master performers to assist task analysis.
48. Work with remote team members, SMEs and customers/vendors/stakeholders.
49. Determine appropriate technique, technology, and media to support learning objectives and strategies.
50. Manage time efficiently.
51. Work on multiple projects at a time.
52. Organize and archive documents and other materials.
53. Ensure the instructional content is appropriate in language and culture for global audience and translation.
54. Identify the needs and performance gap.
55. Write design documents.
56. Understand and utilize LMS or other implementation environment for implementation, training management and possibly performance improvement recommendation.
57. Set up and schedule training sessions.
58. Administrate registration process.
59. Organize a set of related content into a curriculum or program.
60. Write training/business proposals.
61. Apply message design principles for screen design.
62. Create and edit graphics and other non-multimedia instructional materials.
63. Produce and edit animation, video and audio Web materials.
64. Do programming or coding with computer languages.
65. Collect, establish and disseminate lessons learned and best practices within the team or for one's future work.
66. Benchmark other organizations.
67. Evaluate and determine appropriate tools for design and development.
68. Keep proprietary information confidential and follow the required procedures.
69. Listen well to understand and translate information for instruction.
70. Be passionate and enjoy your job.
71. Work with the combined roles of project manager, instructional designer, instructional developer in a given project.

72. Create project plans.
73. Negotiate with customers, vendors or stakeholders to manage expectations, goals and resources.
74. Present in meetings.
75. Facilitate training sessions.
76. Run statistic research and analysis on the collected evaluation data.
77. Recommend other instructional or non-instructional interventions using the evaluation data.
78. Sell ideas, proposals, or expertise to the management.
79. Comply with participating employee's union regulations and policies.
80. Recruit and allocate human resources.
81. Self-motivated, committed and positive.
82. Direct, monitor or act in the audio or video recording.
83. Deliver instructions and training synchronously or asynchronously.
84. Align business goals to instructional objectives.
85. Identify the potentials and limitations of WBI.
86. Get professional certification or recertification.
87. Analyze the characteristics of the learning environment.
88. Be sensitive to accessibility design.
89. Adapt to criticism and changes without taking personally.
90. Set an example by working hard.
91. Update knowledge and skills by going back to school for formal training.

APPENDIX M PERCEPTION ON FUTURE WBI

Participant Code	Perception of WBI Future
001	Social media for instructions Caution: - How knowledge sharing can be used for instructions? - How to use the social media to convey the information but not necessarily performance based instruction? - How to integrate the social media aspect to instruction without losing the integrity of the instruction itself?
002	The move to mobile. A lot of learning delivery is going to happen more on mobile devices. May not be traditional Web-based instruction, it may be more applications, more information-based. A wider range of solutions in learning delivery. Can be very informal.
003	The general people are developing Web instruction materials now in HowTo, YouTube. It is driven by the novices, developed by the novices. Nobody is monitoring it, nobody is looking at whether or not it is true instruction, how and if that person is an expert. Caution: - We should be slow to keep up with that trend for formal learning. Use informal learning as a support, but don't rely on that. - To design instruction to meet the learner's needs, we really need experience, and that piece is never going away. Learning is going to become more and more technical at faster pace, we are always going to need sound instruction designers, we are not going to rely on general public on everything.
004	o More Web-based instructional training. With the Clouds technology, we are able to launch more Clouds courses, share more real time, to have more collaboration between different learners. So learners at one location can see what's happening in other locations. Get learners collaborate and learn together. o More projects can be done over the Clouds remotely in a team with members in different physical places, with protected storage space, controlled sharing and real time reviewing.
005	o Things are getting leaner and meaner, the employers are looking for instructional designer to be a designer and developer and have project management skills. The hard coding Flash developer days are starting to go away. o Organizations are realizing most successful instructional designers are very self-directed and very much have to manage the tasks that they are doing. They understand that instructional design is the profession and there is art and science to it. o Won't have pure eLearning , there is always somewhat blended. People are not going to go back as much to the classroom training as it has been in the past. We should be able to work with the blended solution and to use the technology work across geographies. o Broad audience, diverse preference and learning style.
006	o Instructional design is becoming more technology involved, business oriented. o More just in time training, as well as the traditional training. Continue to have "books on line" interactive type eLearning, but the information will be presented in just-in-time smaller segments. o With the evolution of smart phones, mobile knowledge management databases will become more prevalent. o More virtual K-12 schools.
007	o More mobile devices. o Learning becomes more of where you go out and find the information that you need.
008	o More video. More mobile. Have more Web-based instruction pervasive and easier and accessible. So it's going to be more of a pull as a top down push. There are going to be technologies and implementation techniques that are going to be right in front of

	you. o More convenient and on demand. More advisory type of tools, where the system is analyzing your business and your actions and it will alert you or assist your learning. o The social media technologies are becoming the collaborative technologies.
009	o More hands-on simulation, like Flash or video. o More job related. o It is going to continue that we don't see training department in every company.
010	o Understand what social media is and its differences, how content exists in free flow of communication. o Apps driven augmented reality: - Classroom space got expanded. - Performance support tools & elements. - Automate help in collaborative space. - How to develop learning apps. o Web based training world is …. Oh my!
012	o Instruction means something that is designed. o We are seeing more experimentation with virtual settings, where content is delivered less chronologically. The learners drive the direction and the control of their own learning processes. That does not mean that there is no design, though. It just means that it is less directive and more learner controlled. o As the technology improves and has improved, there is more utilization of virtual classrooms. Instructors are going synchronized classes in a virtual setting where there are distributed learners across the geographic distribution, maybe globally. Very much instructional, very structured, it is scripted, interactions built in advance. o The cost overall is lowering. That allows the bigger companies to do more, but also smaller organizations to be able to do it at all. It is not so much just that this is where WBI is moving from now to the future, it is rather than people are getting into it in the first place who have not had the opportunity to get into it before. o A push towards the conversion of existing materials that are used for face-to-face instruction to the WBI. Online class is primarily put to the autonomy of the individual instructor.
013	o Instructional designers have to have an incredibly open mind because there are so many things that they need to pay attention to. Technology for example, because within two years, everybody's going to be designing things for a tablet. o People are expecting rich media, simulations, interactions. People are expecting very engaging experience when they take a course. They don't want to just be told something; they want to be engaged and they want to interact with that course and things like that, and have decisions. Learners will not waste time with a course. If it doesn't engage them, they're going to be out into the next thing or they'd find another way to learn it. o Edu-tainment.(Education + entertainment)
014	o Mobile learning. o People start using more social learning communities. More informal learning opportunities and more collaborative instructional design. Designing learning that uses the learner as the SME. With more bandwidth, we can do a lot more video. Get better at courses of online learning for soft skills.
015	Less traditional, shorter timelines, less stable content, shorter shelf life. Produce the glossy things with very little tools. Do all these fancy high tech things like informal learning and drive that through social media.
016	o The technology is allowing for more rapid design and development, rapid prototyping. o More virtual, more online collaboration. Distance education integrated with virtual instructors into Web based design or to supplement Web based design. Online courses are more prevalent and more accepted. More application in new frontiers, across industries and professions.

APPENDIX N ADVICES FOR PEERS AND NEW GRADUATE IN WBI

Participant Code	Advices
001	Utilize professional groups' meetings, training, and webinars, and publications, keep reading to keep with what's going on.
002	○ To keep up with the new development, we have to spend at least an hour a day reading all the literature that's on the Web. It's very hard to keep up with, but we have to do it, or the world will pass us by. ○ A designer has to keep up with the latest developments in learning theories as well as technology. We should at least understand what the latest technology is and what it can do and cannot do. ○ Better to have a very supportive manager: Encourages everybody for various professional groups, their publications, blogs, and LinkedIn discussion boards, and possibly sponsor national conferences. If not, go to a lot of local meetings, such as ISPI, ASTD local chapter meetings, and the Society for Technical Communications.
003	○ Definitely keep in touch with former colleagues. Do a lot of readings. Attend seminars and meetings. Do a lot research on the Web for general browsing, benchmarking of vendors to see what other companies are doing, what's the trend. ○ Do social networking with LinkedIn, Facebook. More companies are getting on the Web too, that gives us a chance to network professionally, and to join groups that are keys in our interest areas.
004	○ Subscribe to online sites or magazines that are in our field to be constantly updated with what's going on ,what's coming down the pipe, what's the other people doing, what's the other companies doing. Attend conferences because that is where we get some of our better ideas. Never stop learning, get paper magazine and attend conferences, you always need to, because at least to know what is going on. ○ If you don't keep up what's going on, you are going to find yourself out of job, producing "samo, samo" instead of coming up with different ways to do things. ○ Recommendation: LinkedIn, Facebook, ASTD, ISPI, Lectora group.
005	○ We should be involved in the professional organizations. Join groups at LinkedIn, professional chats, do networking to keep informed. It's important to be connected. We should weave in researches. We should be in the position to educate ourselves, it helps to be educated to be an expert. ○ For training professionals who are skilled depending on background, for people who just fall in to positions because they have been around for a couple of years, there's definitely a difference in terms of approach and success rate. ○ Be a person with credential and experience so to have a better collaboration with other experts in the field. ○ Recommendation: ASTD, ISPI, eLearning blogs.
006	○ As an ISD, we are never done with learning. Don't isolate ourselves, attend professional meetings , participate in LinkedIn forums on eLearning and conferences. Keep reading to keep up with broad knowledge. ○ Teach ourselves emerging technologies. ○ Keep thinking about the proper place for social learning, such as LinkedIn, blogs, Twitter, Nings, wikis.
007	○ We need to demonstrate that our skills add to the bottom line – that as a business implementing a new product to service, that its success is closely related to how well people are prepared to perform. ○ We need to demonstrate competency in the tools that are required to do the job. Having a strong foundation of learning theory is very important. ○ Have business process knowledge, like Six Sigma. Build that into academic program.
008	○ Keep up with trade publications, new research, new technologies and plug into other

		arenas of technology, not just your own. Join blogs or other case management portals.
	o	Designing and developing is easy, managing the project as a whole, managing, coordinating and relying on different people is difficult. Stay current with that type of skills. Have analytical skills, the design skills and communication skills, as opposed to the coding skills.
	o	Play with tools. A lot of readings.
	o	Recommend: ASTD, ISPI.
009	o	Web development applications are changing all the time. Be familiar with Adobe Creative Suite and stay on top of it.
	o	Stay involved with a professional organization. Sign up for various LinkedIn groups and take a look at the discussions.
	o	Wish companies realize the importance of training and how we help not only the companies but the end users. We are part of a process that's involved in prevention. A lot of times it's more cost effective to throw money toward preventative means rather than fixing problems once they arise. Wish companies realize the importance of hiring a full time training department.
010	o	The people side of learning is not going to change soon. If anything, we tend to be getting worse. The technology side of it is constantly changing. Must have a good understanding of it. What do we do with a new widget? Participate, be part of it, ask, observe with strategic point of view. Be excited, not passive, don't be techno-phobia. We are going to hurt ourselves if we refuse to learn and draw a line between designer and developer. Be a learner. Get a broad experience.
	o	Have a good blend of academics and practitioner.
	o	Socializing with other practitioners. Go to meetings.
	o	Be aware of global population.
	o	Be creative.
011	o	Be self motivated to keep up with this new information. Be part of professional organization, ISPI or ASTD. Because often times they have their fingers on new technology.
	o	Become certified either through ASTD or ISPI. Part of the recertification process requires ongoing education, university coursework.
	o	Attend conferences. Continually get better at our job and stay abreast of the changes and where the field is going.
	o	Instructional design tracks very detail-oriented people who are the ones seem to excel, because of the nature of the job. The challenge is that those are the same kind of people who are less adapt at the soft skills or focusing on the relationship side of things or being the best team players that they can be. Be able to be sensitive and aware of some of the non-technical things that can often times be just as important, if not more so.
013	o	Folks that have been in the business for a period of time, get out of the comfort zone, look and see what else is out there. Browse and critic other courses. ISDs today need to really think about engaging the learner, to focus on that learner, to get this information to stick and to make them want to learn. Stay in touch with the younger audience and find out from them what kind of things would they like.
	o	Learn how to design for tablets.
	o	People are finding ways to get information all over the place, they're learning from YouTube. Social informal learning is absolutely where people get information. There's going to be more of an emphasis on structuring those and make sure that information is appropriate and correct.
	o	Don't miss the boat, change your skills. We don't have to be an expert but at least be open to it.
	o	Read often. It's very important to be part of those. Once in a while, talk the training talk with peers.
	o	Go to the consortium or any of those large events, or smaller local ones.
014	o	Be on online forums, such as LinkedIn group, the Articulate user community, or the Captivate communities for example, to keep up with technology in the field
	o	ASTD or ISPI conferences and events, when the company pays for it.

015	○	Don't be the kind of instructional developers or designers who just do it, get the paycheck, and go home. Be the one with a broad skillset, who are constantly reading, blogging, going to conferences, incorporating old and new and mashing it up, and not looking at the boundaries but looking for the solutions. It's all about performance improvement. We need to be internal business consultants.
	○	Create things that have impact. Guide somebody not to do that has no impact.
	○	Companies should invest more in training when the economy was down.
016	○	Instruction designers are trained properly in analysis, and how to correctly identify training objectives that are appropriate for Web and not appropriate for Web, and also understand the requirements, understand how to treat the content to allow the learners to be effective.
	○	To keep up with new technology, designers should be trained in a spectrum of authoring tools, because how people learn remains the same, what's changing is the tools. Be able to gravitate to a new tool.
	○	Educational professionals will need to equip the students to design courses with different methods of delivery and more than one tool. That is unacceptable that too many designer-developers don't know to work with video and audio files. School curriculum needs to incorporate all of those tools and software into the programs.
	○	Must have a strong background in instructional design theory, learning theory. Get practical experience in internship, for example. Have a portfolio when come to the workforce.

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ABSTRACT

COMPETENCIES OF EXPERT WEB-BASED INSTRUCTION DESIGNERS

by

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Major: Instructional Technology

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Web-based instruction has been increasingly accepted in education, business and industry, military and government, healthcare and other sectors as a dominant means to deliver instruction beyond time and geographical constraints. However, the overall quality of WBI courses or programs remains a concern. The reasons for the ineffectiveness can be many, of which is the lack of sufficient competencies and skills in existing professionals. This study attempts to identify the domains, competencies, performance statement for instructional designers in WBI at the expert level. IBSTPI competency model has been used as the conceptual framework, utilizing mixed methods.

As a result, 91 performance statements, 20 competencies and four domains were identified. The communication skill has been rated as the most important competency for expert instructional designers in WBI. It was revealed that professional foundation domain has the highest level of support, while the planning and analysis has the least.

The study indicates that the work environment has certain impact on the performance statements and competencies. In particular, the size of company and project team are two possible factors determining the unique presentation or absence of some

competencies and performance statements, as well as the patterns of the most demonstrated competencies and performance statements. Overall, the bigger a company or instructional project team gets, the more project management skills have been demonstrated by the WBI experts. It is increasingly demanding of WBI expert instructional designers to take many different responsibilities as the project team gets smaller.

The opinions on future direction for WBI suggest social media for instruction, mobile learning, cloud learning and collaboration, virtual or online classrooms, and more on-demand and engaging WBI, as the five prevailing trends. To prepare for the future, expert instructional designers in WBI must keep getting involved, networking professionally and be open minded for emerging tools and techniques.

AUTOBIOGRAPHICAL STATEMENT

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