

SERIOUSLY, THERE IS NO TIME FOR DESIGN

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Training can often be the right answer—or part of the right answer—to help people learn how to do something that is new for them. Although some may be tempted to ignore instructional design when faced with a tight time line, that is exactly when following a systematic process can provide a recipe for success. Given six important questions, the right ingredients, and the right recipe, even quick development efforts will benefit from instructional design.

THERE IS ONE good reason to provide training: people do not know how to do something that matters. There is another reason, which may or may not be good: laws, regulations, or people with clout have mandated that you must provide training on a particular topic. That is a different story, but if the mandated training is also about something that people do not know how to do, and it is important for some reason, then the hints in this article will work for that training as well.

Providing training makes sense if whatever it is people do not know how to do is important to society, the organization, or the person and it is impossible, inefficient, expensive, or dangerous for them to figure it out on their own, even with clear goals and ample information, job aids, a local or virtual coach, or access to social media.

Sometimes we find out that we have to create a training program pretty close to the last minute. There are many reasons that this happens—for example, attempts to be nimble to match new customer or regulatory requirements; sudden content, audience, or context changes; a lack of training resources; or just terrible advance planning. If you are responsible for making training happen, one of these reasons will show up sooner or later.

Using the analysis, design, development, implementation, and evaluation (ADDIE) model for structure and some examples from real projects, this article provides an argument for using instructional design even when the time line is ridiculously short. It also includes some tips for making that possible.

To set the stage for short time lines, consider two projects. In the first, a new client was desperately looking for an instructional designer who was available right away for a project with “an insane time line.” Intriguing. We will call this company Rearranging Useful Services in a Hurry (RUSH). She explained that there were two weeks to go before 25 newly hired employees would arrive for three weeks of training on a complex customer service process. For these new customer service representatives, learning the process was daunting. It included new products, customers with special needs, sometimes prickly salespeople, exacting finance representatives, and new software systems. In addition, they had to learn to follow complex government and other regulations that would be new to them.

For an even more rushed example, it is Monday, and you are invited to help create training that will teach experienced customer service representatives to facilitate orders for unfamiliar products for a new set of customers. In addition to learning about the products and how those products assist customers, the representatives will have to learn to use new software tools, follow new rules, and avoid running afoul of even more regulations. And just to make this more interesting, these products may literally mean the difference between life and death. There are constraints for the class: you have only four hours to train the reps, and the training must be delivered on Thursday morning, in just three days.

This all seems pretty hopeless, right? Real instructional design takes forever. Or, as some say, it can take about 40 hours of work to produce 1 hour of instruction (Chapman, 2010). We will take a closer look.

ASSESSMENT AND ANALYSIS

It would be tempting to skip assessment and analysis when time lines are so short. After all, who has time for analysis paralysis? Pause a moment here, and answer this question: Even with a tight time line, which of the following can you afford to ignore?

1. *Assessment.* Is this fire drill worth the effort because, in fact, people do not know how to do this thing *and* it is really important for some good reason?
2. *Audience.* Who are the people we will be training? What do they know about this already? Is there anything else about them we had better figure out beforehand, such as whether they will love or hate learning what we have to teach them?
3. *Content.* What must they learn? Do we have a subject matter expert? Do we have any existing materials?
4. *Context.* How many students? When and where can we train them? What tools or systems are available for training? Who is going to (or who can) deliver the training?

Of course, asking which of these areas you can ignore was a leading question. You probably said (I hope) something like this: “Well, we pretty much need to figure out something about all four of these things.”

With a tight time line, you must answer questions in these four essential areas quickly. Even when a deadline is looming, ask these six questions first:

1. Why is this important?
2. How will we know that we have succeeded?
3. How do we know that our people cannot do this already?
4. What do they know about it so far?
5. Broadly speaking, what should they be able to do?
6. What people, materials, and tools do we already have to support this training?

If you have more time, you can drill down into each of these areas, ask more questions, and work for more clarity. But under no circumstances should you ignore any of these questions when putting training together. A short time line is no excuse. Get out a napkin, if necessary, and fill in the answers, at least in broad strokes. The only exception is if your organization has unlimited time and money to squander on a program that does not matter, and nobody really cares about the results anyway.

INGREDIENTS FOR SUCCESS

Let’s say you have a group of people who must learn something important, and you have determined that providing training is the best way to help them in a hurry. You will need some people, some things, a process to follow, and a few cautions about time.

People

One person can play more than one role in putting together your rapid instructional design project, but here are the roles someone must fill:

- Client
- Instructional designer (experience will make or break this role)
- Subject matter expert (articulate, knowledgeable, available)
- Trainer (assuming live instruction in a classroom or at a distance)
- Member of the target audience
- Reviewers
- Desktop publisher

Decide who will manage the project (often this will be the instructional designer for smaller projects), and have a brief conversation about who will do what to make the project a success. You have no time for a quirky subject matter expert who will not cooperate or nonexperts who do not really know their stuff. If your internal or external client wants this in three days and it is important, you have leverage: insist on good people for your team.

Things

You will probably have some of the following:

- Existing materials, for example, documentation, slides (perhaps created earlier to sell this idea to decision makers), and older training materials that include some relevant pieces, or job aids
- Templates for a participant’s guide, slides (if needed), learner reaction questionnaires (level 1), and learning assessments (level 2)
- Training location and tools (for example, software, hardware, licenses)

Process

Use a systematic process and the recipe provided here, and you can put something together in a short time frame that may surprise you. More important, it should give you much better results than if you just go straight to making

slide decks and then numbing your learners with “death by PowerPoint” (Garber, 2001). Despite the lack of time, you can still create decently designed instruction that works.

Notes About Time

You have a short window to get this done, so here are some cautions about circumstances that will take more time than you have and will likely derail your best efforts:

- No access to anyone who knows how to do this
- No existing materials
- People who cannot work together well
- Too many reviewers or reviewers with difficult-to-resolve conflicting opinions
- People on your team who cannot play their role due to inexperience or personal issues
- An inability to make decisions and move forward

RECIPE

Assemble a Small Team

Use the smallest team that can possibly get the work done (this cuts down on the number of necessary communications and therefore saves time). Each team member should contribute essential skills to the project—for example, instructional design, project management, subject matter expertise, training and facilitation, documentation creation, and information technology.

Assess and Analyze: Get Started

Have a conversation with people who know the learners and the subject well, and take notes. Ask questions that give you the following results:

- *Assessment:* Go/no-go decision about providing training to this audience on this topic in this time frame and a statement about what you’ll accept as evidence that your program was a success. If members of the training audience already know how to do this or it is not really important, then you can stop now (barring a regulatory or executive directive). If they know how but something isn’t being done as it should be, then look for other causes besides a lack of knowledge and skill.
- *Audience:* Description of the learners and, especially, an idea about what they know already (their prior knowledge). This tells you where to start and what you can leave out. Obtaining a sense of the learners’ attitudes toward the subject and training will help, too. If you don’t know what they know already or how they feel about it, how will you decide what to put in your training program?

- *Content:* A general idea about what the learners have to do once you are done training them. Many of the things we teach in organizations are processes (or parts of them)—for example, follow a newly introduced new product development process, use a new sales process, take a customer’s call, and fulfill the order; troubleshoot a problem; use tools to get a result; or discuss performance with an employee. Make a list of the major topics.
- *Context:* Notes about where the training will be, how many students there will be, and what tools are (or should be) available for their use during training. Also helpful would be a sense of whether their supervisors are supportive of the training as well as whether they do or should know how to do this already. Determine who is responsible for getting students to the training, reserving any facilities, and ensuring that required tools (e.g., software, hardware, licenses, and passwords) will be available when you need them. Avoid asking context questions at your peril.

Design: Develop an Outline

An outline can serve as a planning tool for the development team, be reviewed by stakeholders, and also be used by the trainers as a leader’s guide. (See Table 1 for an example.) Have your designer create the outline with the subject matter expert. Display the outline so that everyone can see it as it is being created. If your team is not all in the same place, then use collaboration tools like WebEx or Google Drive.

If today is Monday and the training must be delivered Thursday morning, then put your list of topics (from your content analysis) in the order the learners are most likely to perform them under normal circumstances. These are your lessons. Add lessons for what to do when predictable problems arise; for example, how to do troubleshooting or add special permissions. Number the lessons.

Make a time estimate for each lesson. Rate each one on a scale of high, medium, or low for chances that someone will make an error and also for the consequences of that error. Spend the most time on areas where the chances and consequences of error are greatest.

Add active ingredients for each lesson. Ideally list what students should learn (objectives) and why (rationale), teaching activities (e.g., demonstrations, presentations), practice (e.g., follow along as the instructor demonstrates, small group activities), and feedback. When the time line is tight, you may not have time to write everything out. In that case, you will have to count on the instructor and subject matter experts to fill in the lesson-level objectives and rationales during training. Although it is preferable to document

TABLE 1		TRAINING OUTLINE		
LESSON	LESSON TOPICS	TIME AND CHANCES AND CONSEQUENCES OF ERROR	TOOLS AND MATERIALS	NOTES
Lesson 01: Introduction	Icebreaker, logistics, objectives, agenda	15 minutes Low/Low	Introduction slides	Pass out materials, provide overview of the training
Lesson 02: High-level overview	Process overview	20 minutes Low/Low	Process map	Review process map, purpose of the process changes
Lesson 03: Customer identification	Gathering and recording customer information	30 minutes Medium/Medium	Recording: Customer call Systems: customer service representatives dashboard Identification job aid	Show how to enter new customer information; have the learners practice with sample cases
More lessons as needed				

these up front, you may have to wait until after the first running of the course to write them down. What you must capture are notes about how the instructors will present the material and what the students will do to practice. This includes notes about how to conduct activities. Figure out how you will know the students have mastered each lesson. You might not have time to create a test or a rubric for performance demonstrations, but you may be able to rely on observation by the instructors or subject matter experts.

Figure out what you can provide to the students for reference during training. What do you have already? If there are some relevant existing materials, make a list—for example, part of a slide deck used to convince the division chief that this way of doing things was a good idea, materials used previously for related training, job aids, documentation from the information technology team, or screen shots of online tools. Decide which pieces you can use.

Do you want a participant’s guide with that? Assemble what you have already. Decide what has to be updated and if you must create anything new. With a tight time line, you have to carefully ration the time you spend making changes or new materials. For changes that you have no time to make now, plan to have students update materials during class. Note any job aids or other materials that you cannot create in time. Plan to create them after the training is delivered and include them in follow-up sessions.

Develop: Helpful Project Management Tools

Have a meeting at the beginning of the development phase to review the process and tools you will use to assemble your materials quickly. This can be a call where

you use collaboration tools (if you cannot all be in the same room) to show the structures you will use for coordinating and producing materials for your course. Make sure team members are clear on their roles and how you will be coordinating the project.

Assembly Coordination. Put your list of lessons in a spreadsheet or table (see Table 2). If your project team does not sit together (ours was located in different states), put the spreadsheet online. We used Google Docs (now Google Drive), but you could put your spreadsheet on a shared drive or use collaboration software like SharePoint.

If you will have a participant’s guide or handouts, list the documents you want to use next to each lesson on the spreadsheet. Put each item on a separate line, so that when you add instructions, it will be clear which instructions go with which document. Put the items in the order they should be used in class. Include a separate column for slides or other support you will be creating for the learners.

Provide instructions for each document. For example, list the page numbers or slide numbers to include, note headings to add, or say that you want a screen shot of one particular illustration. For a course you are creating too quickly for a reasonable alternative, use a mixture of text, screen shots, and pasted slides. When there is so little time, you will have to use materials mostly as they are, even if all you have to work with is someone’s marked-up copy of something that was used before. Repeat as necessary: “We love this just as it is for now, and we will fix it for next time.” There is one exception: You must fix

anything that will result in misunderstandings that could lead to errors with high consequences.

In the “Participant’s Guide Status” column, have team members who work on lessons write notes. They should include their names or initials; otherwise, it can be confusing to know who said what. At a glance, other team members can see if something still has to be done, is ready for review, has been reviewed, needs changes, or is ready to print. To make this even easier, we color-coded some text; for example, blue was for lessons that were ready to print, and orange was a reminder that something should be printed in color.

We used two reviewers for the materials, the instructional designer and the trainer, who was also a subject matter expert. Once they both indicated in the status column that a lesson was done, work stopped on that lesson and it was ready to print.

Materials Production. We set up a structure in Dropbox (you could use any shared drive system) to give us a place to put all the pieces for each lesson that we would assemble into a participant’s guide, handouts, and slides (see Figure 1). Each lesson had its own folder, labeled “01 [Lesson Name],” “02 [Lesson Name],” and so forth. Numbering them in this way kept them in the order in which we would use them and corresponded to the

numbering on the assembly spreadsheet. We also had folders for templates, old courses from which we were taking pieces, lessons ready for review, lessons ready to print, slides, and assessments.

Templates are a big help with quick production, and if you have an attractive template, then the materials you assemble, which may come from a variety of sources, will miraculously look more professional because they will have the same headers, footers, and overall formatting. Templates also save time because no one has to think too much about how to format anything. It is useful to have templates with common question types for level 1 (Reaction) and level 2 (Learning) assessments. You can customize your assessments quickly when you have a model to modify rather than starting from scratch. If you are blessed with someone whose role on the team is to put the materials in the correct format, then your instructional designer and subject matter expert can use their time to review lessons as they are completed, work on those few items that must be created or modified for this course, and work on assessments.

Using collaboration tools like these can allow a small team to assemble materials quickly and efficiently. It is surprising how quickly something useful to learners can be put together using mostly existing materials and this development process.

TABLE 2 ASSEMBLY INSTRUCTIONS					
LESSON	PARTICIPANT’S GUIDE PIECES	PARTICIPANT’S GUIDE STATUS	SLIDE DECK PIECES	SLIDE DECK STATUS	NOTES
Lesson 01: Introduction	Title page	*pwf: Ready for review *jrf: Done *kmm: Looks good	Title slide: “RUSH Intake Process”	*jrf: pwf, Please create using RUSH template pwf: Slide template in Ready for Review *jrf: Done *kmm: Looks good	PG and slide templates are in Dropbox Templates folder
	RUSH Intake Objectives.docx	*jrf: Ready to add (use longer versions)	RUSH Intake Objectives.docx: Make a slide with the shorter versions	*pwf: Ready to review	
Lesson 02: High-level overview	Compliance Intake FINAL.pptx: put slides 16–26 two up in the PG	*jrf: Ready to add *pwf: Ready to review *kmm: Looks good, but page 1-6 is blank *jrf: Was just an extra carriage return. Gone now & done!	Compliance Intake FINAL.pptx: use slides 16–26	*jrf: Ready to add	This is all we will use from this deck
More lessons, as needed					

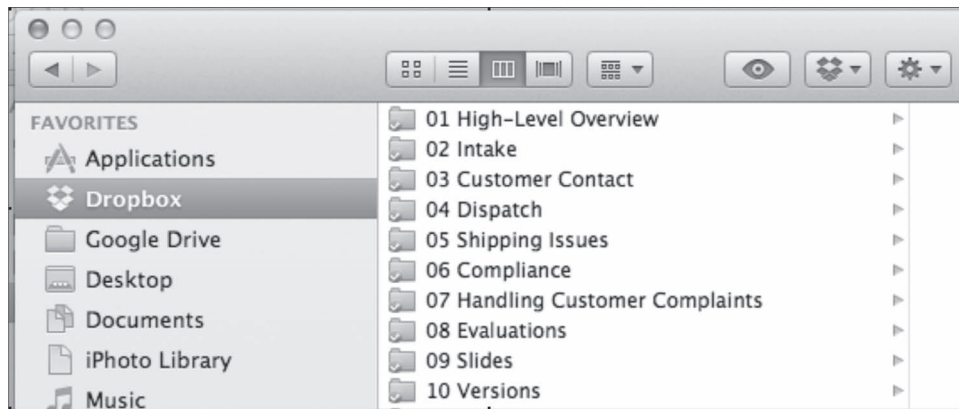


FIGURE 1. EXAMPLE OF SHARED FOLDERS

Implement

A subject matter expert can be invaluable for presenting technical content that no one else has had time to grasp sufficiently. However, experts are often not the best people to be responsible for managing a class. Left to their own devices, many of them would lecture the entire time, and they are often not comfortable giving directions for activities. If that happens, then learning will suffer because the learners will not have enough time to practice or be engaged with the material.

Pair a trainer, facilitator, or human resource professional who has training skills with the subject matter expert to teach the class. Have the trainer set things up, keep things moving, and organize activities. The subject matter expert can focus on giving technical presentations and answering questions.

In the case of the three-week program for new employees that we put together in about two weeks, there was no time to create a participant's guide. We were lucky to have handouts. But this provided a useful opportunity for learner engagement. A few days into the first week, the learners already had an unwieldy pile of handouts. So we passed out notebooks, three-hole punches, blank tabs, and sticky notes. All learners assembled the stacks of paper we had given them into an order that worked for them, and they marked the pages they wanted to be able to find quickly with sticky notes. In a different environment, we could have organized soft copies of the materials in a shared drive that the learners could have downloaded, organized, and annotated as desired.

Evaluate

Formative Evaluation. Along the way there will be some formative evaluation, even with quick projects like those described in this article. You can include design reviews (of the course outline) and materials reviews (of the raw materials or the assembled participant's materials) by the

designer, subject matter experts, trainers, a sponsor (or delegate), and even a member of the target audience if you can organize their time and restrict changes to those that are absolutely necessary. We were unable to have a dress rehearsal or other pilot test of these programs, so the programs themselves became pilots. This enabled us to have an approach based on making improvements as needed or for the next course offering.

Reaction and Learning. In some organizations, when people do not perform as expected, the first place people look to assign responsibility (or blame) is the training organization. In the case of the three-day development process, we used level 1 (Reaction) and level 2 (Learning) instruments for several reasons: to gauge the confidence level of the learners, ensure that they did not have any misconceptions at the end of the training that might result in errors or compliance issues, and gather input for a future instance of this course when there might be time for revisions. Also, if we tested them and they could carry out the process accurately, there would have to be another reason that they were making mistakes after training. For example, they might be attempting to do good work in the midst of a poorly designed process, with inadequate tools or information, or they might be the victims of poor feedback systems. Giving our learners a learning assessment was in part an act of self-preservation, especially given the speed with which we put the course together.

Transfer and Payoff. For a quick level 3 (Transfer) evaluation, the trainer observed the learners to see what they were using from the course. For level 4 (Payoff), a few weeks later we compared errors made by representatives who attended the training with those made by representatives who did not.

If you have a few minutes during the assessment and analysis phase of the project, think about how you will

determine later whether they are using their new skills on the job; for example, by observing or conducting interviews. To determine payoff, ask what your sponsor will accept as evidence that the business goals behind offering this training were met—for example:

- Did error rates go down?
- Is compliance up?
- Are orders processed in a timely manner?
- Are the new widgets being sold at an acceptable rate?

Follow Up

Because we created these materials so quickly, we paid careful attention to the level 2 results. In the case of the training that we put together in three days, the whole class missed two parts of the same test question. The trainer followed up with the representatives after training and showed each one how to calculate the right answer in the future.

Without the assessment, she would not have known that the whole class walked away with a shared misconception. Not only did we have a chance to correct the problem right away, but we also made updates for the next class so the learners would not miss that content the next time.

In the case of that class with the short time frame, the customer service representatives we trained were new to these products. For weeks after training, they demonstrated 100% compliance, even though there are a lot of regulations for them to follow. Contrast that with representatives who had been working with this set of products for quite some time prior to the training. The experienced representatives who were not trained had multiple compliance issues during the same period. We count this as evidence that the training did what we hoped it would do. We will follow up to give the experienced representatives training to bring their performance up to the level of the new representatives who were trained.

WHY WE HAVE TIME FOR DESIGN

While it is theoretically possible to create a process that people can use without training because it is intuitively obvious, is run with software controls that prevent errors,

or has job aids that require no explanation, new and longer-term employees who must do something new often have to learn how. If providing training is the most efficient way to do this, often the case, you will have to build some kind of training program. When you are in a hurry, chances are that this program will be in person or mediated over the web.

As the saying goes, “Telling ain’t training” (Stolovitch & Keeps, 2011). Do not throw a subject matter expert up in front of a classroom or WebEx conference and expect learning to occur. Instead, make sure that you have assembled a carefully chosen minimum amount of assessment and analysis information and that you are taking into account the active ingredients for learning (at a minimum, a rationale, objectives, practice, and feedback). If you want to be sure that the learners have mastered the material, then test them: if the answer is yes, great. If the answer is no, then you will know if more assistance is required. And if the answer is yes but the students have trouble executing on the job, then you’ll know to look somewhere beyond what your learners know (and training) for the solution.

With instructional design, you have a better chance to make sure that your learners do know how. It does not have to take forever or be a stultifying process that does not add value. In the right hands, it can be the vehicle we use to take advantage of what we know about how people learn and how we can help them to do so. Even with a tight time line, if we use instructional design to help people learn what they need to know to meet personal, organizational, or societal objectives, we can be confident that we can make a significant contribution. 🌅

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