ADDIE Instructional Design Phase

**The Role of Instructional Design**

Once a training specialist has written the course's learning objectives and confirmed them with the client, it's time to begin the instructional design phase. During the design phase, the training specialist plans what the course should look like when it's complete. At the end of the instructional design phase, the training specialist produces an instructional design document for the course. In many ways, this document is similar to an architect's blueprints or a software engineer's design document. The instructional design document describes the course's content, but it doesn't contain the course content—just like a blueprint isn't a house and a software design document isn't the actual software.

In this section, we'll explore the ADDIE instructional design phase and the steps that a training specialist takes to build the instructional design document.

**Create an Instructional Strategy**

At the start of the instructional design phase, the training specialist should have a pretty good idea of what the learners will already know when they start the course (through a learner analysis). The training specialist should also know what learners will need to learn during the course (as stated in the learning objectives).

How do you create a course that helps people move from what they already know and gain mastery of the new material? That's the question that the instructional design process answers.

During the instructional design phase, the training specialist reviews the course's learning objectives and considers the following questions:

1.How should content be organized? 

2.How should ideas be presented to learners? 

3.What delivery format should be used?

4.What types of activities and exercises will best help learners?

5.How should the course measure learners' accomplishments?

The answers to these questions help the training specialist produce the instructional design document. This document describes the course structure and its instructional strategies.

During the instructional design phase, the training specialist does not create course content. The actual course content and training materials will be created during the training development phase.

**Steps in the Instructional Design Phase**

There are basically three steps in the instructional design phase:

1. Plan the instructional strategy 

2. Select the course format

3. Write the instructional design document

We will examine each step in more detail in this section, beginning with the instructional strategy.

Instructional Strategy

**Developing an Instructional Strategy**

At this point in the instructional design process, the training specialist makes important choices about the course's structure and its methods. Overall, these choices combine to form a comprehensive instructional strategy to help people achieve the course's learning objectives.

When instructional designers create instructional strategies for courses, they draw upon theoretical knowledge and practical experience. There are many different ways to sequence and present content to learners. It's the instructional designer's responsibility to choose the correct instructional strategies for the course and the learners.

On this page, we'll take a look at three issues that instructional designers consider when they devise an instructional strategy:

1 How will course material be grouped and sequenced?

2 What instructional methods and tactics will be used to present material?

3 How will assessments measure a learner's success?

These three issues often overlap(重叠) with each other; a choice in one area may affect the other areas.

**Grouping and Sequencing Content**

The training specialists must decide if any of the course's learning objectives should be grouped together. You can't teach everything at once, but sometimes it makes sense to put related topics together for the learners. These related topics can form the basis for a course module.

Once topics have been grouped together, the training specialist has to organize the content into a course structure. The content inside of each group needs to be sequenced and then the groups themselves need to be sequenced together to form the course structure. Here are just a few of the many possible sequencing options:

1 Step-by-step 

2 Part-to-whole 

3 Whole-to-part 

4 Known-to-unknown 

General-to-specific

As you can see, there are many different ways to organize and present course material. The instructional designer chooses the structure that makes the most sense for the learners and the course content.

**Choosing Methods and Tactics**

In the instructional design phase, the training specialist has to decide how the course material will be presented to the learners. Specifically, we're looking at the types of activities and exercises that will be in the course. Here are just a few examples of different types of learning activities:

1 Group discussions 

2 Modeling

3 Scenarios（情景介绍，脚本） 

4 Mnemonics（记忆术） 

5 Drills操练

6 Applied practice

If you want to teach someone how to type on a keyboard, you might recommend rote drills and applied practice. However, if you want learners to develop interpersonal skills, rote drills offer limited value. Role play scenarios（情节情境） and group discussions would probably be more effective learning activities. Generally, the course's activities and exercises must fit with the type of learning people will be asked to do.

**Designing Assessments**

At the end of the needs analysis phase, the training specialist created learning objectives that defined measurable tasks and criteria for success. Now, in the instructional design phase, the training specialist creates assessment tools that will measure the learners progress.

If you have a driver's license, you probably completed two types of tests before you received your license. You completed a written test that measured your understanding of street signs, laws, and procedures. You probably also performed an on-the-road test where someone observed your driving skills. The two tests measure different capabilities.

You could be very knowledgeable about traffic laws and procedures but a poor driver behind the wheel（车轮方向盘转动）. Similarly, you might be good at driving the car but poor at recognizing street signs and safety procedures（程序手续）. You have to pass both tests before you can obtain a driver's license. （例子）

The course's assessments should measure a learner's progress towards each of the learning objectives. The types of assessment must fit the learning objective.

Selecting the Course Format

**Choose the Class Type**

In the ADDIE model, the training specialist chooses the course's delivery method during the instructional design phase. This seemingly simple choice will affect almost every aspect of the design document and the final course content.

The course delivery format should mesh with（一致符合） the learners' needs, the content, and also the client's business goals. Some types of course material can be easily presented through job aids and self-study materials, but other courses work best when learners come together as a class under the direct guidance of an expert instructor.

The course delivery method impacts how learners experience the course and its content. If the training specialist chooses the right delivery method, it will make the learning process easier for the learners. However, if the delivery format doesn't fit the content and learner's needs, then the course will have very limited success.

**Course Delivery Options**

In the corporate training world, there are many different course delivery options for the instructional designer to choose from. Here's a list of some of the choices and links to other pages where we discuss these formats in more depth:

1 Instructor-led courses

2 Paper-based self-study materials 

3 Synchronous e-learning 

4 Asynchronous e-learning 

5 Job aids

Ideally, the training specialist selects the class type during the instructional design phase. However, sometimes companies will select the delivery format even before conducting a training needs analysis. When a company pre-selects the delivery format, the training specialist may face a greater instructional design challenge. We'll take a closer look at that situation on our instructional design in the workplace page.

Instructional Design Documents

**The Role of the Design Document**

At the end of the instructional design phase, the training specialist writes an instructional design document. This document provides more than just a simple course outline; it provides a high-level overview of the entire training solution.

A training specialist's instructional design document provides detailed instructions on how to build the course, but it doesn't contain any actual course content; it's similar to an architect's blueprint or a software engineer's design document.

Generally, an instructional design document will perform the following tasks:

1 Describe the overall learning approach 

2 Identify instructional media choices 

3 Cluster（串，聚集）and sequence objectives 

4 Describe course exercises, activities, and assessments

Together these five elements create the overall instructional strategy for the course. A short course might have a very simple design document, but complex and lengthy courses can have very detailed design documents.

The instructional design serves as a major quality assurance checkpoint（质量保证）. The training specialist and the client discuss and agree to the design before development begins. It's a lot easier to adjust the design than redevelop materials later in the project.

**Benefits of the Design Document**

Intulogy's training specialists use the instructional design document for four main purposes:

1 Check that the design concepts are cohesive（紧密结合的） and complete 

2 Present the proposed training solution to the client 

3 Invite feedback about the design 

4 Provide instructions to other training specialists who may work on the development phase of the project

Instructional design documents may also contain additional project-specific elements. For example, if the course has an e-learning element, the instructional designer might describe the interface's appearance and functionality.

Let's take a closer look at each of these four main purposes in greater detail.

**Check the Design Concepts and Content**

The course's instructional strategy should allow the learners to achieve the course's learning objectives. Once the instructional design document has been written, the training specialist can take a step back and look at the whole design, not just individual pieces. The design document makes it easier to spot（认出） areas that have unresolved questions or need additional information.

**Present the Proposed Solution**

Intulogy's training specialists will present the instructional design document to the client. Often, we'll schedule a meeting or conference call to walk through the course design and explain our choices.

Our instructional designers base their choices on adult learning theories and methodologies, but we ask them to explain their choices in language that makes sense to non-specialists.

If you're not a training specialist, your eyes might glaze over if someone told you how each learning objective links to Robert Gagné's Nine Events of Instruction（加涅的九阶段教学论） or Keller's ARCS Model of Motivation.（凯勒的ARCS动机模型） You just want to make sure that the instructional design choices will actually fulfill the learning objectives. We use clear and comprehensible language to explain the choice.

**Invite Feedback about the Design**

After our training specialists present the instructional design, we ask for feedback from the client. We often collect suggestions from project leaders, leadership champions, subject matter experts, and other stakeholders.

The instructional design document specifies what the final course will be like. It's important to build consensus（凝聚共识） and agreement before starting course development. Sometimes, when we walk through the instructional design with the client, we hear someone say, "oh, we really should add . . ." or even "that's been changed . . ." However, that's exactly the feedback we're looking for. It's much easier to revise the instructional design than to revise a fully-developed course.

**Provide Instructions to Other Developers**

Large training projects often require more than one training specialist. For example, an e-learning project may require a full team of training specialists—instructional designers, graphic artists, storyboard writers, editors, programmers, and voice talent. The instructional design document guides the complex project and allows everyone to be involved with the project's goals and structure.

The instructional design document is part of the ADDIE methodology, but it's also a real-world tool that guides projects and provides a high level of quality assurance. We'll take a closer look at real-world instructional design documents on our instructional design in the workplace page.

Once the client and the training specialist have agreed on the instructional design document, it's time to start creating the course materials. In the next section, we'll look at the ADDIE training development phase.

来源：<http://wenku.baidu.com/view/4368b8f69e3143323968931f.html?re=view>

Designing Your Training Blueprint

If you were building your dream house, you would want to make sure that the architect provides the builder with a clear set of blueprints that, when followed, creates the dream home you envision.

Your training needs are very much like that dream home. In the needs analysis phase, you identify your training needs and goals. During the instructional design phase, Intulogy’s training specialists create the blueprint for future training development.

How Does Intulogy Build an Instructional Design?

Intulogy’s instructional designers will create an Optimal Learning Solution (OLS) for your project. We base our design on the information provided by your project leaders, subject matter experts (SMEs), and representative end-users during the needs analysis phase. We consider your timeline, training needs, resources, and technology options. Here is an overview of some of the steps we take during the instructional design phase:

**Determine the Entry Behaviors of Participants**

In an adult learning situation, it is very important to consider what the learners already know and how they will approach the material. Our instructional designers identify the skills, knowledge, and attitudes an average participant can be expected to possess at the beginning of the course.

**Set Performance and Learning Objectives**

We then identify what skills, knowledge and attitudes the learners need to achieve through the course. Our training specialists write learning objectives that define a task, a context (or situation, and a measure of succes. Here are some examples:

 The supervisor can conduct annual performance reviews, based on company guidelines.

 The technician can use current procedures for nightly backup of system records.

 The representative can accurately enter all fields in the new customer profile within five minutes.

The course’s goals are critical to its success. If you say you want people to “understand” a topic how will you measure their understanding? How will you know they really understood and can apply the concept? So, it’s best to write learning objectives that lead to actions that you can observe and measure.

**Build the Training Online**

Intulogy creates a detailed training outline showing the individual training steps that will take your participants from their entry behaviors to the completion of the learning objectives. We make sure that each training step is relevant and builds upon previous steps. Together, the steps lead the participants toward the learning objectives.

**Create Performance Assessments**

At this point, we consider how an instructor or supervisor can determine whether the participant has met the learning objective. A learner may be asked to demonstrate a skill, identify the correct action, or apply the knowledge.

**Select Program Format**

During this step, we evaluate possible methods of training delivery, based on Intulogy’s Optimal Learning Solution assessment. Our training specialists evaluate the costs and benefits of each delivery option, and we provide a formal recommendation.

**Review the Instructional Design**

Intulogy works with you to make sure that the design meets your needs, and we invite your comments and review. We listen carefully to your suggestions and make revisions based on your input. Once you give your approval on the design, we are ready to proceed to the instructional development phase.

来源：<http://intulogy.com/training-solutions/process/instructional-design/>