

Sutherland’s Instructional Design Learning Series Increases New Hires’ Speed-to-Proficiency

Sutherland Global Services

Best Advance in Competencies and Skills

December 2022



Company Background



Company-at-a-Glance	
Headquarters	Pittsford, NY
Year Founded	1986
Revenue	\$1.2 Billion
Employees	40,000
Global Scale (Regions that you operate in or provide services to)	Australia, Brazil, Bulgaria, Canada, China, Colombia, Estonia, Egypt, India, Jamaica, Malaysia, Mexico, Morocco, Philippines, Slovakia, Sweden, United Arab Emirates, United Kingdom, United States
Customers/Output, etc. (Key customers and services offered)	Industries Served: Banking & Financial Services, Healthcare, Insurance, Media & Communications, Retail, Technology, Travel & Hospitality, Government Services, Process Transformation (digital, customer engagement, business process)
Industry	Commercial Services
Stock Symbol	Private Company
Website	www.sutherlandglobal.com

Budget and Timeframe

Budget and Timeframe	
Overall budget	\$6,897.75
Number of (HR, Learning, Talent) employees involved with the implementation?	1 Instructional Design Sr. Manager 3 Instructional Design Manager 3 Instructional Designers
Number of Operations or Subject Matter Expert employees involved with the implementation?	None – The initiative was led by the instructional design team of Sutherland.
Timeframe to implement	4–6 weeks
Start date of the program	May 2021

Business Conditions and Business Needs

Sutherland’s Digital Learning Group (DLG) started getting more projects due to the influx of training transformation requests towards the end of 2020. This required an urgent need to fill instructional designer positions to complete the projects effectively. As a response, DLG opened its doors to Sutherland’s training delivery team, most of whom are adept in facilitation but needed guidance and support in instructional design and development. As projects were implemented, opportunities in efficiency and overall quality of output produced by the newly onboarded resources were observed. This had an impact on the turnaround times of the deliverables and decreased cost savings for the organization. Though there are existing risk management and mitigation practices to address potential project issues related to quality and on-time delivery, Sutherland needed a sustainable and steady-state solution.

To address the performance gaps, the Instructional Design (ID) Learning Series skills development program was conceptualized and released in the second quarter of 2021. This helped reinforce the newly onboarded resources’ instructional design knowledge and skills and align them with Sutherland DLG’s current workflow to ensure speed-to-proficiency.

Overview

The ID Learning Series is a transformation of the current onboarding program into a one-size-fits-all solution that addresses different new hire profiles with speed-to-proficiency as the primary motivator. While there are readily available training programs on instructional design, Sutherland DLG evaluated and selected topics most relevant to the team’s design and development processes.

The ID Learning Series is comprised of eight modules that leverage different instructional design concepts (see Figure 1).

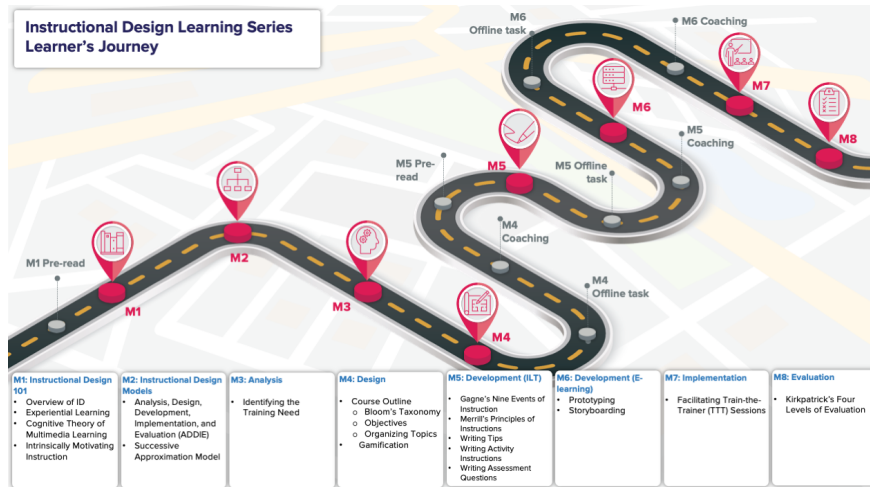


Figure 1 – Instructional Design Learning Series – Learner’s Journey

The curriculum includes self-paced reading materials to introduce the instructional design concepts, virtual instructor-led training sessions and immersive workshop activities with coaching sessions to simulate real-world work applications and help learners relate the concepts to actual tasks or workflows in the DLG design and development process.

Design of the Program

During the conceptualization of this program, DLG came up with a list of three design considerations:

- The arrangement of the topics should mirror the DLG processes.
- There should be a variety of engaging and learner-centered activities that help simulate the actual workflow.
- The training schedule should be flexible enough to allow both learners and facilitators to still complete their day-to-day tasks with ongoing DLG projects.

Operational Framework

To address the first consideration, the ID Learning Series used the actual DLG design and development workflow to map out the sequence of the learning modules. This helps ensure that the learning experience is consistent with how the design and development process is implemented (see Figure 2).

ID Learning Series

Integration of Instructional Design Concepts and DLG Processes

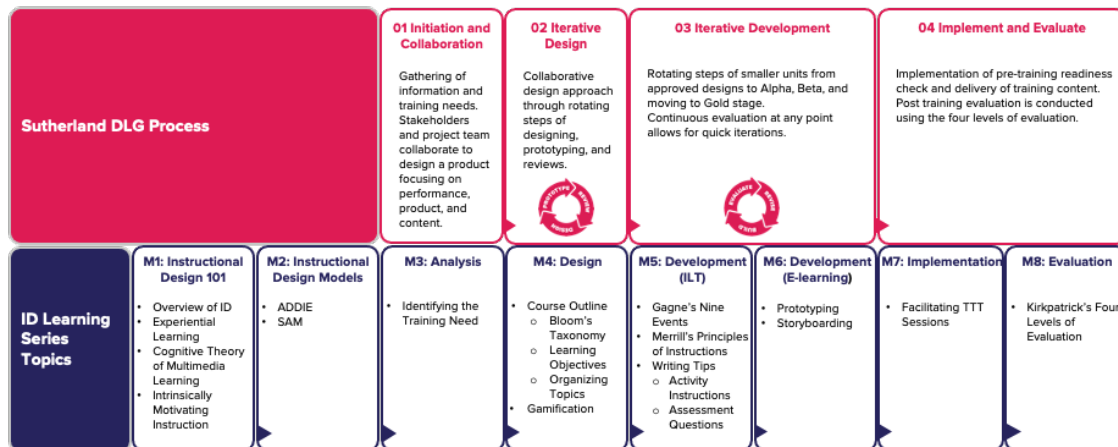


Figure 2 – ID Learning Series Operational Framework

Learning Experience: Goal-based Scenario Framework

The second design consideration is inspired and based on a constructivist model called the Goal-Based Scenario Framework¹. The framework provides that a sound instructional design has a defined list of covered topics, goals that the learners should pursue, concrete tasks to perform, and available resources to support learners' onboarding – all within an environment conducive for learning.

ID Learning Series

Goal-Based Scenario Design Framework



Figure 3 – Goal-based Scenario Framework

As an overarching theme of the curriculum, each element of the Goal-Based Scenario Framework was applied to the overall design.

- Learning Goals: By the end of the training, the learners are expected to design a training curriculum based on uncovered needs and create training materials based on ID concepts.
- Mission: The learners must complete an instructional design project from end to end, following DLG’s established processes.
- Cover Story: The learner is assigned their very own instructional design project and the client needs their help to build a new hire curriculum (see Figure 4).

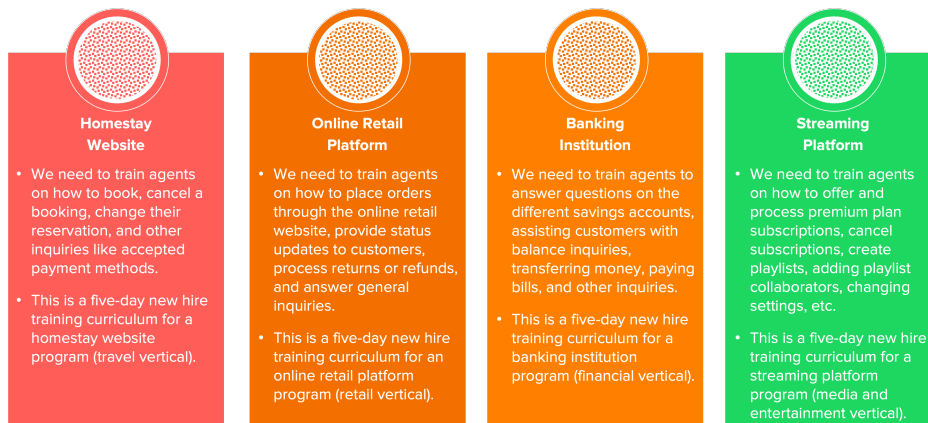


Figure 4 – Cover Story Map

- **Role:** The learner is an instructional designer who must conduct discovery sessions to uncover training needs, create a training outline based on their findings, and develop training materials.
- **Scenario Operations:** The learners will participate in immersive activities such as simulated discovery sessions, mock design presentations, and output-based activities for scripting and storyboarding.
- **Resources:** The learners will have access to quick reference guides on ID concepts, activity sheets, and instructions for offline activities hosted in the LMS and organized in the training roadmap.
- **Feedback:** The learners will receive regular coaching sessions that provide a venue for feedback and clarifications based on output evaluation.

Training Approach

With the third consideration in mind, the modules within the ID Learning Series incorporates the task-based approach illustrated below (as applicable for the covered topics). In this training approach (see Figure 5), the learners spend 75% of the time on offline output-based activities that allow immediate application of learning to real-world tasks.

ID Learning Series

Task-Based Training Approach

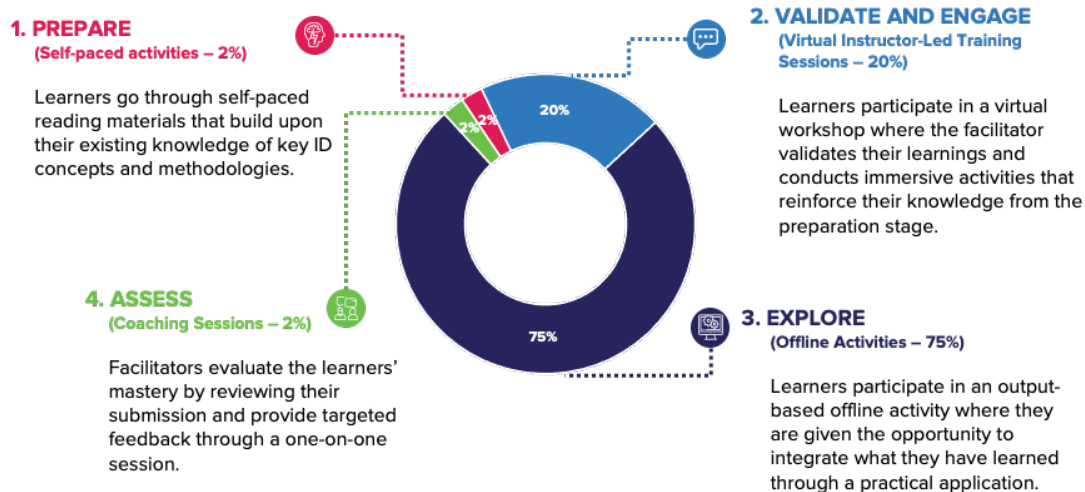


Figure 5 – Task-based Training Approach

This approach promotes a safe environment for the learner to make mistakes, receive feedback, and make corrections until they have completely mastered the required skills.

Learners are unable to progress to the next module until they are mentored and given support.

- **Preparation:** Learners will access and download interactive quick reference guides that contain information about the topics covered in the succeeding workshop. This allows learners to absorb information at their own pace in terms of their learning and availability.
- **Validate and Engage:** A session of structured activities facilitated remotely through Cisco WebEx. Below are some activities facilitated in the online sessions:
 - Review activities to check their current knowledge
 - Discussions to foster peer-to-peer learning
 - Presentation activities to practice client and stakeholder interactions in DLG's real-life projects (i.e., mock discovery sessions, mock learning engagement sessions where their peers and "clients" provide feedback and suggestions on their curriculum outline)
 - Debrief sessions that allow all learners to ask questions, clarify unclear concepts, and for the facilitator to ensure that every learner is on the same page
- **Explore:** This is where the learner's synthesis takes place. They will apply what they have learned in their self-paced and online sessions through an offline activity that they can complete at their own pace within a set period. Their outputs are materials specific to their assigned program (i.e., course outline, facilitator guide and presentation deck, storyboard, an e-learning course prototype, and an assessment or certification program).
- **Assess:** The facilitator will evaluate the output upon submission and schedule a one-on-one coaching session with the participant to provide feedback. The learner will then apply the feedback and make revisions, as necessary.

Delivery of the Program

Training Curriculum

Below is the curriculum breakdown of the ID Learning Series.

ID Learning Series

Curriculum Breakdown

LEGEND

- Prepare (Self-paced)
- Validate and Engage (VILT)
- Explore (Offline Activity)
- Assess

Module 1 Instructional Design 101	Module 2 Instructional Methods	Module 3 Analysis	Module 4 Design
<ul style="list-style-type: none"> ● Experiential Learning (Kolb) ● Cognitive Theory of Multimedia Learning (Mayer) ● Intrinsically Motivating Instruction (Malone) ● Overview of Instructional Design <ul style="list-style-type: none"> ● What is Instructional Design? ● Role of an Instructional Designer ● Experiential Learning Principles ● Cognitive Theory of Multimedia Learning ● Intrinsically Motivating Instruction 	<ul style="list-style-type: none"> ● The ADDIE Model ● ADDIE as a Workflow ● The Successive Approximation Model (SAM) ● SAM and the DLG Process 	<ul style="list-style-type: none"> ● Training Needs Analysis ● Identifying the Training Need 	<ul style="list-style-type: none"> ● Blooms Taxonomy ● Course and Curriculum Design <ul style="list-style-type: none"> ● Organizing Topics ● Designing and Writing Learning Objectives ● Course Outline Creation ● 1:1 Feedback Session ● The Value of Gamification in Learning ● Sutherland's Gamification System ● Gamification System Creation ● 1:1 Feedback Session ● Process: Learning Engagement ● Simulation: Learning Engagement Session

Figure 6 – Curriculum Breakdown 1

Module 5 Development (Instructor-led)	Module 6 Development (E-learning and Video)	Module 7 Implementation	Module 8 Evaluation
<ul style="list-style-type: none"> ● Gagne's Nine Events of Instruction ● Merrill's Principles of Instruction ● From Theory to Practice <ul style="list-style-type: none"> ● The Learning Sciences and Instructional Design ● Gagne vs. Merrill ● The Designer as a Writer ● Writing Tips ● Write a Facilitator Guide ● 1:1 Feedback Session 	<ul style="list-style-type: none"> ● Prototyping ● UI and UX Elements ● Prototyping @ Sutherland ● Prototype Creation in Canva ● 1:1 Feedback Session ● Storyboarding ● The Sutherland Storyboard Template <ul style="list-style-type: none"> ● Visual Hierarchy ● E-learning Interactions ● Writing Developer ● Storyboard Creation ● 1:1 Feedback Session 	<ul style="list-style-type: none"> ● The Training-the-Trainer Model ● Facilitating a Train-the-Trainer Session <ul style="list-style-type: none"> ● Process ● Preparation ● Best Practices ● Simulation: Facilitate a Train-the-Trainer Session 	<ul style="list-style-type: none"> ● Kirk Patrick's Four Levels of Evaluation ● Training Evaluation Plan <ul style="list-style-type: none"> ● Designing Post-Training Survey Questions ● Post-Training Survey Questions Creation ● 1:1 Feedback Session

Figure 6.1 – Curriculum Breakdown 2

Each module follows the *Prepare > Validate and Engage > Explore > Assess* approach, except for the foundational modules (Module 1 and 2). Learners are required to complete all self-paced quick reference guides before they attend the VILT session.

The offline activities are organized to flow from one to another mimicking DLG's actual instructional design process that the learners will undergo once they are involved with an instructional design project. To further explain:

- **Module 3's *Mock Discovery Session*:** Learners prepare a list of discovery questions that they would ask their “clients” (a role played by design managers within DLG) to uncover the training needs of their assigned “program.” They schedule a meeting with their “clients” to ask these questions and gather as much information as they can.
- **Module 4.1's *Course Outline Creation*:** Learners design a training curriculum based on their uncovered needs—complete with topics and/or subtopics, learning objectives, learning deliveries, and training duration.
- **Module 4.2's *Gamification System Creation*:** After completing their initial outline, learners add a gamification system into their curriculum.
- **Module 4.3's *Mock Learning Engagement Session*:** Once their gamified curriculum is “approved” by their “clients,” the learners prepare for a learning engagement session where they will present their curriculum to their peers for feedback.
- **Module 5's *Write a Facilitator Guide*:** The learners select an instructor-led module from the curriculum they created and build the module’s facilitator guide.
- **Module 6.1's *Prototype Creation in Canva*:** The learners select an e-learning module from the curriculum they created and build an e-learning prototype using Canva. The e-learning prototype is checked for appropriate UI elements, branding, and useability.
- **Module 6.2's *Storyboard Creation*:** The learners use their output from Module 6.1 and then create an actual storyboard for their chosen e-learning module, complete with content and instructions for the developer on navigation, element animation, and voiceover syncing.
- **Module 7's *Mock Train-the-Trainer Sessions*:** After completing the training materials, learners prepare for and conduct a mock train-the-trainer sessions with their peers as the audience.
- **Module 8's *Post-Training Survey Questions*:** The learners create survey questions that they need to ask the training “audience” to evaluate the effectiveness of their learning.

Each offline activity is followed by either a group feedback session (for Modules 3, 4.3, 7, and 8) or an individual coaching session (for Modules 4.1, 4.2, 5, 6.1, and 6.2). The learner still has the flexibility to make revisions based on their received feedback and have their output reviewed again until they gain mastery of the skill.

Learning Delivery

Below is an example of Module 5 (see Figure 7): Development (ILT) and how the *Prepare > Validate and Engage > Explore > Assess* training approach was applied to each module.

Sample: Module 5 Development (ILT)

Module Framework, Learning Delivery, Target Skills, and Learner Experience

PREPARE **VALIDATE AND ENGAGE** **EXPLORE** **ASSESS**

Introduce learners to the Gagne's Nine Events of Instructions and Merrill's Principles of Instruction as guidelines in creating their facilitator guides.

Interactive quick reference guides enable learners to click on sections of the document to view the information.

Knowledgeability

Introduction
In the 1960's, educational psychologist Robert Gagne introduced a nine-step process that explains the events required for effective learning. This is called Gagne's Nine Events of Instruction and it is one of the most used instructional design models since it provides a more structured framework in developing effective learning.

The Nine Events
1. Gaining Attention
2. Informing Learners of the Objectives
3. Stimulating Motivation to Learn
4. Presenting the Content
5. Encouraging Active Participation
6. Providing Feedback
7. Assessing Performance
8. Encouraging Retention and Transfer

Merrill's Principles of Instruction (MPI)
Merrill's Principles of Instruction (MPI) asserts that learners learn best when tasked to solve real-world problems. David Merrill developed it in 2002. It emphasizes that effective learning is promoted when learners are engaged in solving real issues and shown how to do so.

The Organizational, Analytical, and Problematic in Real-World

Figure 7 – Screenshots of Sample Module

The self-paced reading activities in the form of quick reference guides (QRGs) are uploaded in the Sutherland Academy of Excellence (AOE), the company’s learning management system (LMS). The learner is free to read the materials at their own time provided that they complete it before the scheduled VILT session.

While these are reading materials, the QRGs are built to be interactive where learners have sections that they can click to access information. Zooming in to the image above will show that there are instructions for sections that the learners can click to keep the delivery of information interactive.

Sample: Module 5 Development (ILT)

Module Framework, Learning Delivery, Target Skills, and Learner Experience

PREPARE → **VALIDATE AND ENGAGE** → **EXPLORE** → **ASSESS**

Engage learners in virtual, facilitator-led activities to review and discuss concepts learned. The goal is for learners to gain confidence in applying Gagne and Merrill's instructional strategies.

Facilitators and peers provide support through feedback and debrief session.

- Comprehension and Recall
- Critical Thinking

Activity: Merrill vs. Gagne
 Display: [Image of a virtual meeting]
 Slide 8
Facilitator Note: Make sure that there are breakout rooms ready for this activity.
 In this activity, the participants will compare and contrast Merrill's Principles of Gagne's Nine Events of Instruction based on their reading prior to the start of the session.
Activity: Merrill vs. Gagne
 Duration: 15 minutes
Materials Needed:
 - Merrill's Principles of Instruction QRG
 - Gagne's Nine Events of Instruction QRG
WebEx Features Needed:
 - Breakout rooms
 - Whiteboard
Instructions:
 1. Ask the participants to pair up and assign each pair a breakout room.
 2. Have them list the similarities and differences of the two instructional I
 3. Once the time is up, bring them back to the main room and have them reflect on the class.
Facilitator Response:
 - Debrief
 - Both are systematic ways in creating effective and meaningful experiences
 - Merrill and Gagne both agree that activating prior learning is important. This is seen in Merrill's Activation phase and Gagne's first three events.

Activity: Writing Your Content
 Display: [Image of a virtual meeting]
 Slide 17
Facilitator Note: In this activity, the participants will reconstruct the activity instructions and discuss in the given breakout.
Activity: Writing Your Content
 Duration: 30 minutes
Materials Needed:
 - Talent Program_D04_Mock_Calls_PD_01020198_SAMPLE.docx
Instructions:
 1. Inform the participants that this is an individual activity.
 2. Ask them to go over the content of the attached.
 3. Have them rewrite the discussion and activity instructions based on their own personal writing style, which you will facilitate prior to discussing this.
 4. Once the time is up, ask the learners to present a summary of their output ideas. You may use the whiteboard to take note of the learners' answers.
Debrief:
 Conduct a debrief questions for asking the questions below. Encourage discussion; any unclear concepts are necessary.
 - How did you find the activity? What was easy and what made you struggle?
 - How was your general experience and how did the content and delivery into your writing?
 - Are you able with its progression or does it have to be improved?

Activity: Write Your Own Quiz
 Display: [Image of a virtual meeting]
 Slide 23
Facilitator Note: Make sure that there are breakout rooms ready for this activity.
 In this activity, the participants will create their own assessment questions following the guidelines presented.
Activity: Write Your Own Quiz
 Duration: 30 minutes
Materials Needed:
 - Learner's output from Module 4: Design
WebEx Features Needed:
 - Breakout rooms
 - Whiteboard
Instructions:
 1. Inform the participants that this is an individual activity. Assign one breakout room for each participant.
 2. Have them choose two topics from the curriculum they designed in the previous module. Make sure that they choose two topics (one soft skills and one domain related).
 3. Ask them to create one multiple choice assessment for each topic. Let them know that the questions should meet 25 points each.
 4. Once the time is up, bring them back to the main room and have them present their output to the class.
 5. You may use the whiteboard to take note of the learners' answers and leverage on them as you provide your feedback.

Figure 7.1 – Screenshot of Sample Module

VILT sessions start with a review activity that covers the learners’ self-paced reading materials to check their comprehension and understanding of the topics. Output-based activities are facilitated after each topic to keep the training engaging and ensure high learning retention (see Figure 7.1).

Cisco WebEx’s breakout rooms are leveraged to divide the learners into groups or on their own during activities. The facilitator goes around each breakout room during the activity to provide guidance as needed and give learners the chance to ask their questions, if any, in confidence.

Debrief sessions are conducted at the end of each activity to process the learning and ensure everyone is on the same page and for the facilitator to capture any last-minute clarifications and answer any parking lot questions.

Sample: Module 5 Development (ILT)

Module Framework, Learning Delivery, Target Skills, and Learner Experience



Create own instructional material in the form of a facilitator guide with structured activities to ensure learner retention.

-  Writing
-  Instructional Design
-  Creativity

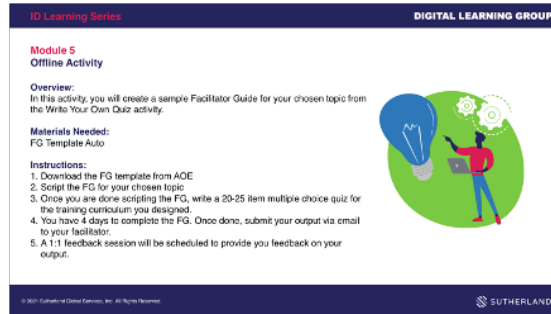


Figure 7.2 – Screenshots of Sample Module

Learners are instructed to download a document (see Figure 7.2) with the instructions for their offline activity at the end of every VILT session. The instructions include:

- A time period on when they should complete the activity
- A location where to download the resources that will help them complete the task (i.e., templates, sample materials, additional information)
- What they need to do once they have finished the task
- What to expect after their submission

Sample: Module 5 Development (ILT)

Module Framework, Learning Delivery, Target Skills, and Learner Experience



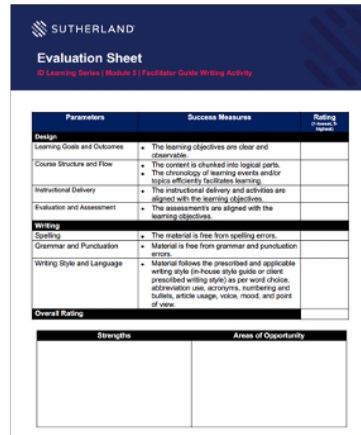
Coaching and feedback sessions intended to provide support to the learners on their progress.

The feedback cycle repeats until the learner has achieved mastery of the target skills.

 Writing

 Instructional Design

 Creativity



Parameters	Success Measures	Rating (1-5)
Design		
Learning Goals and Outcomes	<ul style="list-style-type: none"> The learning objectives are clear and measurable. 	
Course Structure and Flow	<ul style="list-style-type: none"> The content is chunked into logical parts. The chronology of learning events and/or topics effectively facilitates learning. 	
Instructional Delivery	<ul style="list-style-type: none"> The instructional delivery and activities are aligned with the learning objectives. 	
Evaluation and Assessment	<ul style="list-style-type: none"> The assessments are aligned with the learning objectives. 	
Writing		
Spelling	<ul style="list-style-type: none"> The material is free from spelling errors. 	
Grammar and Punctuation	<ul style="list-style-type: none"> Material is free from grammar and punctuation errors. 	
Writing Style and Language	<ul style="list-style-type: none"> Material follows the prescribed and applicable writing style (e-house style guide or client prescribed writing style) as per word choice, abbreviation use, acronyms, numbering and bullets, title usage, voice, mood, and point of view. 	
Overall Rating		
Strengths		Areas of Opportunity

Figure 7.3 – Screenshots of Sample Module

Once the output is reviewed, the facilitator will schedule a coaching session with the learner to provide their feedback (see Figure 7.3). To keep the session structured, the facilitator uses an evaluation sheet with parameters that are specific to the output they reviewed and rates each parameter. These parameters are aligned to DLG’s quality form to closely mirror what happens in the real world.

To keep the training environment at an optimum level for learning, DLG leveraged the use of the LMS by creating a participant roadmap (see Figure 8). Modules and its corresponding materials are uploaded and organized in the order that the learners will use them.

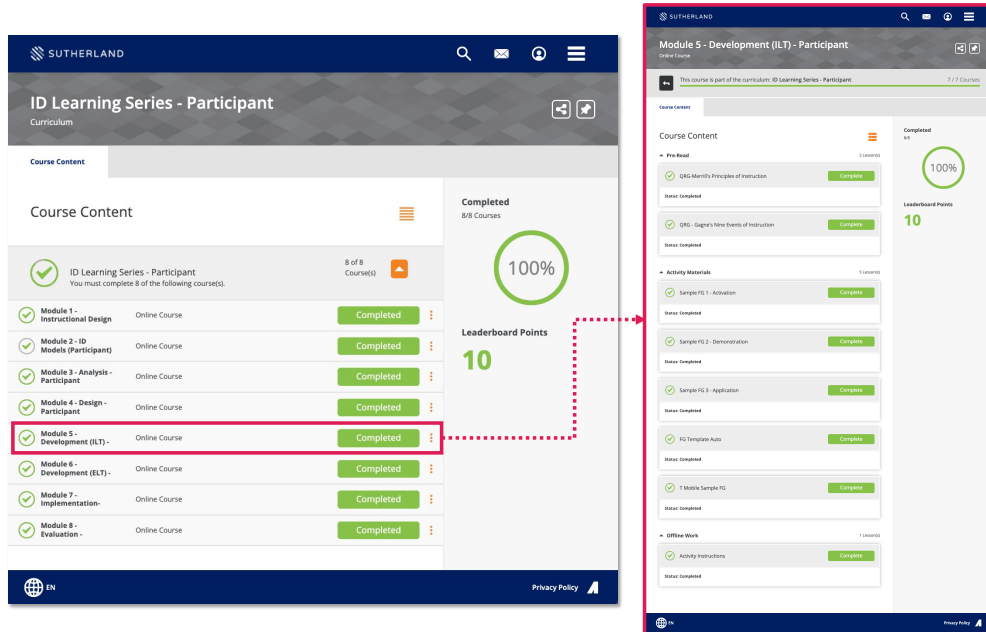


Figure 8 – ID Learning Series Participant Roadmap

The reporting side of the LMS allows the facilitator to check if the learners have completed their required pre-read materials before the VILT session. The example below (see Figure 9) displays the list of participants, their completion date, their course status, and percentage of progress. Facilitators can check the learner’s progress and remind them if they are lagging.

Sutherland Academy of Excellence Redacted Employee Information

Curricula Activity

Actions Mass Actions

Curriculum ID Learning Series - Partic...

0 item(s) selected

1 - 11 of 11 items

	Last Name	First Name	Department	Date Completed	Attained Certificate	Certificate Date	Status	Progress(%)
<input type="checkbox"/>	Redacted Employee Information		97305		No		In Progress	14.29
<input type="checkbox"/>	Redacted Employee Information		97305		No		Not Started	0.00
<input type="checkbox"/>	Redacted Employee Information		97322	2021-10-07 06:05 PM	No		Complete	100.00
<input type="checkbox"/>	Redacted Employee Information		97305	2022-03-02 07:37 PM	No		Complete	100.00
<input type="checkbox"/>	Redacted Employee Information		97305		No		In Progress	14.29
<input type="checkbox"/>	Redacted Employee Information		97305	2021-06-11 11:18 PM	No		Complete	100.00
<input type="checkbox"/>	Redacted Employee Information		97300	2021-10-07 06:27 PM	No		Complete	100.00
<input type="checkbox"/>	Redacted Employee Information		97305		No		Not Started	0.00
<input type="checkbox"/>	Redacted Employee Information		10712	2021-06-10 05:32 PM	No		Complete	100.00
<input type="checkbox"/>	Redacted Employee Information		97305		No		In Progress	28.57
<input type="checkbox"/>	Redacted Employee Information		97322	2021-09-23 07:07 PM	No		Complete	100.00

20 Items Per Page

Figure 9 – LMS Reporting – ID Learning Series

Change Management Efforts

Sutherland DLG applied the *Prosci ADKAR® Model*² of change management during the conceptualization, implementation, and follow-through phases of the ID Learning Series project.

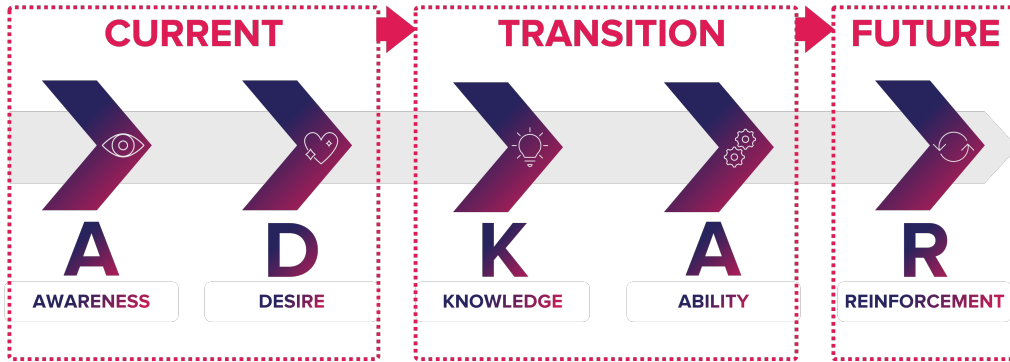


Figure 10 – Prosci ADKAR Change Management Model

Awareness of the Need to Change

The goal is to establish why DLG needed change through a series of multi-level discussions and presenting concrete evidence of the fact.

To establish awareness of the needed change, the team:

- Conducted sessions with reporting managers to gather target participants’ observable behaviors
- Gathered and analyzed relevant performance data to support observed behaviors and the impact of the performance gap on the department SLAs and KPIs
- Started socializing the concept of building a skills development program to the reporting managers, target audience, their tenured peers, and upper management

Desire to Participate and Support the Change

The goal is to get the buy-in and participation of team members from all levels to support the change, from the front-line employees (target audience) to department leaders.

To encourage participation and support from the members, the team:

- Got approval and support from the director to invest time and effort to build and train a skills development curriculum
- Established “what’s in it for me?” with the target audience. Focus group discussions were conducted to gather information on what hinders performance, what information or skills they would like to acquire or improve, and what type of

support they need. The course design included the participants' inputs, quantitative data, and feedback from reporting managers.

- Proposed the curriculum design to the leadership team (reporting managers and director), engaged the leaders to provide their feedback and suggestions to the training curriculum, and encouraged them to participate in the workshops themselves by playing the role of a client

Knowledge on How to Change

There are two goals for this phase. The first is to provide the reporting managers with knowledge on transitioning to a new process that incorporates the ID Learning Series as a future-state onboarding step. The second is to equip the target audience with the knowledge of the skills and competencies they would need to have to perform effectively.

To initiate and build knowledge on how to change, the team:

- Created and implemented a new and structured onboarding governance document for reporting managers to guide them on the additional steps that they must take when a new hire starts employment with Sutherland DLG. The document includes everyone's roles and responsibilities and a list of resources that they will need to onboard effectively.
- Facilitated the ID Learning Series to the target audience over 5.5 weeks

Ability to Implement Desired Skills and Behaviors

This phase aims to support the participants in building their abilities during and after the training. During the implementation, the team:

- Designed the training to incorporate hands-on activities with an immediate feedback system
- Assigned tenured designers as coaches or mentors to the new hires to provide further support when they apply their knowledge to their actual projects

Reinforcement to Sustain the Change

This phase aims to put in a concerted effort and the necessary mechanisms in sustaining the change. To reinforce and sustain the change, the team:

- Created an audit mechanism for reporting managers to ensure consistency in following the new process
- Reevaluated the current rewards and recognition structure and ensured that its incentives directly supported the change
- Created an automated performance dashboard that provides real-time data for employee kudos or corrective action

- Implemented the DLG Discussion Log to keep track of manager-employee discussions and action items to sustain or improve performance (see Figure 11)

1. Establish details of discussion		3. Reinforce strengths		4. Address AFIs	
Employee: (Insert name here)		Sustain (+)		Improve (Δ)	
Manager: Insert name here					
Date of Discussion: 07/13/2021, Tue					
2. Review QTD KPIs					
Productivity:	22 hours				
Efficiency:	5%				
CSAT:	100%				
Quality:	98%				
Effectiveness:	92% to goal				
Innovation:	100%				
5. Discuss other matters					
iRoz dispute					

Figure 11 – DLG Discussion Log

Implementation Challenge and Resolution

The participants were working on time-bound deliverables being involved with their own instructional design projects. The challenge is to still implement the training effectively as designed without compromising the required project output from the participants. The training schedule had to be flexible enough to work on both their existing tasks and training outputs with minimal impact on their projects at the time.

As a solution, DLG created the training calendar below (see Figure 12) to set expectations with the participants and their project leads. Close communication between the training facilitator and project leads was key to coordinating and balancing the participants' workload.

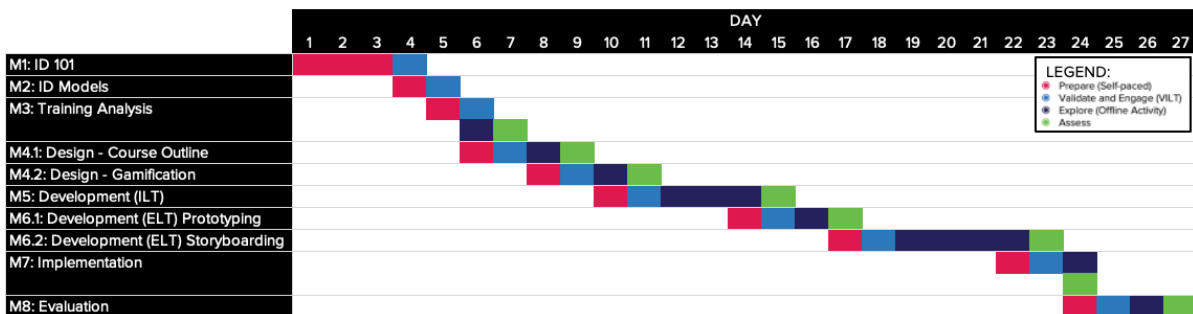


Figure 12 – Training Calendar

While the number of days per task is specified, the schedule allowed the learners to complete the offline work since it includes a buffer. For example, if it takes a tenured designer 6.5 effort hours to complete a one-hour ILT facilitator guide, the learner is given three days to complete the one-hour facilitator guide. The learner can spread out the 6.5 effort hours within that three day-period any way they choose to still allow them to work on their actual tasks for their assigned projects.

Measurable Benefits

DLG has completed 19 projects within six months following the deployment of the ID Learning Series. The team gathered project data relevant to the overall objectives of the ID Learning Series program within these six months. The team planned to look at the following core areas of project performance:

1. Increased speed of development (efficiency concerning product design and development)
2. Maintain quality of work
3. Maintain customer and learner satisfaction

Increased Speed of Development (Efficiency)

As a department specializing in instructional design and project management, DLG places a heavy emphasis on completing deliverables on or before the due date. DLG's statement of work, or client contracts, would sometimes include training launch dates as part of the contract clauses, and not meeting the specified timelines can incur the department a hefty fine or penalty.

There are two critical variables in how DLG measures efficiency:

- Planned Effort Hours – the number of budgeted effort hours planned for training development tasks as scoped by the project manager
- Actual Effort Hours – the number of actual effort hours spent by a designer in developing training materials

DLG did a comparative study on the participants' before and after training performances concerning their efficiency (see Figure 13). Six months before the training, the participants' efficiency score was constantly at a negative percentage (average of -10.29%), indicating that the actual effort hours they spent on tasks were more than what was budgeted.

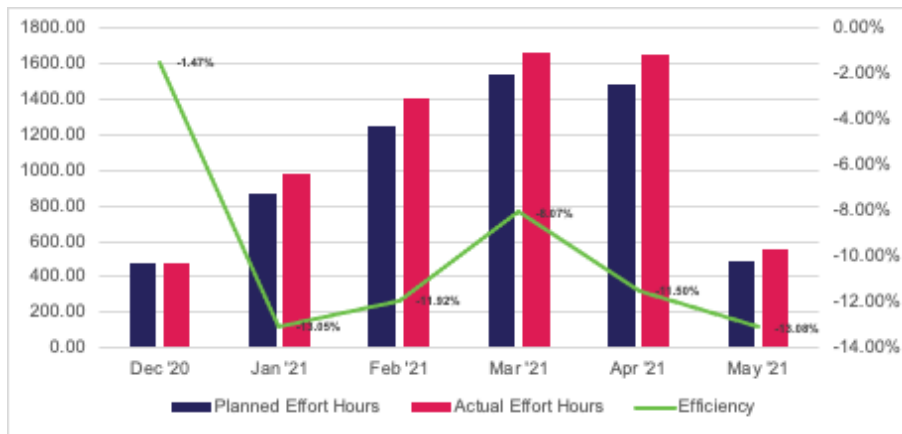


Figure 13 – Pre-ID Learning Series Planned Effort Hours vs Actual Effort Hours

After having gone through the ID Learning Series Training, project performance data indicated that the participants improved their speed in developing training materials, with the trend showing that they are spending less than the planned effort hours (average of 14.01%) within six months after completing the ID Learning Series (see Figure 14).

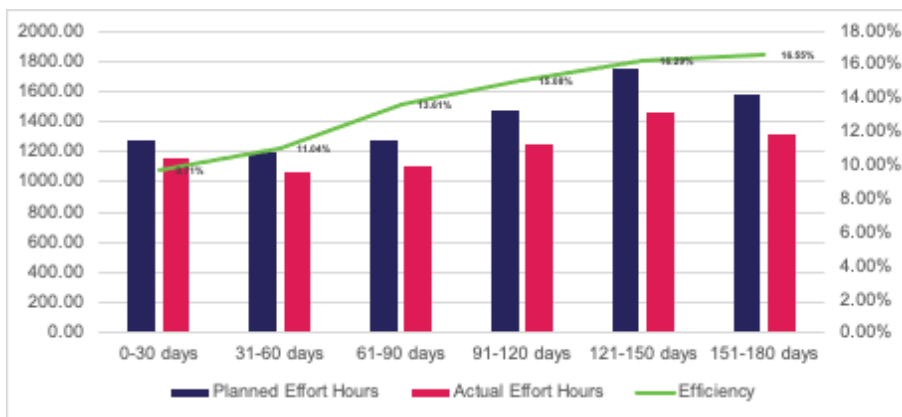


Figure 14 – Post-ID Learning Series Planned Effort Hours vs Actual Effort Hours

The increased efficiency also resulted in increased productivity. Before undergoing the ID Learning Series, the designers spent an average of 30.96 effort hours to produce an hour’s worth of training material. Within six months after the training, they could create an hour’s worth of training material by spending an average of 16.94 effort hours – a reduction of 54.71% in terms of input vs. output (see Figure 15).

	Training Hours Produced (Output)	Actual Effort Hours (Input)	Effort per Hour of Training
6 Months Before ID Learning Series	217.36	6730.51	30.96
6 Months After ID Learning Series	433.92	7350.51	16.94

Figure 15 – Production Output

With the time savings observed and increased productivity, each new hire designer will be able to produce approximately 92.10 hours of training materials within a year after being onboarded through the ID Learning Series. A total of 40+ hours more than the baseline data of a new hire designer producing 50.37 hours of training materials in a year.

Quality of Work

Despite the speed in development turn-around times, the participants maintained their quality scores above the passing rate of 90%.

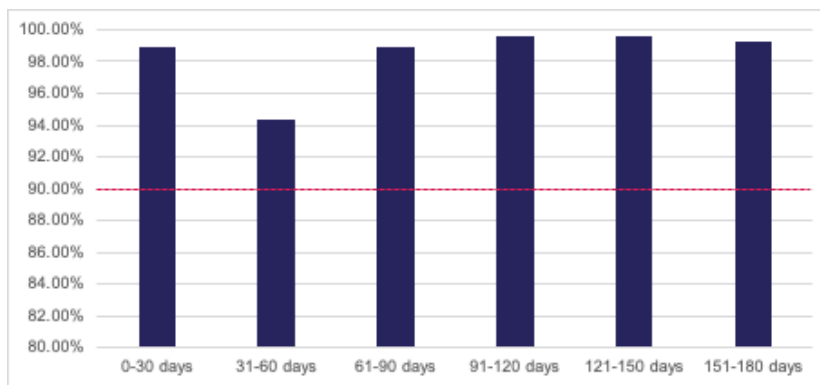


Figure 16 – Team Quality Scores

Customer Satisfaction

During six months, the projects that the participants worked on received top box ratings on customer satisfaction upon completion.

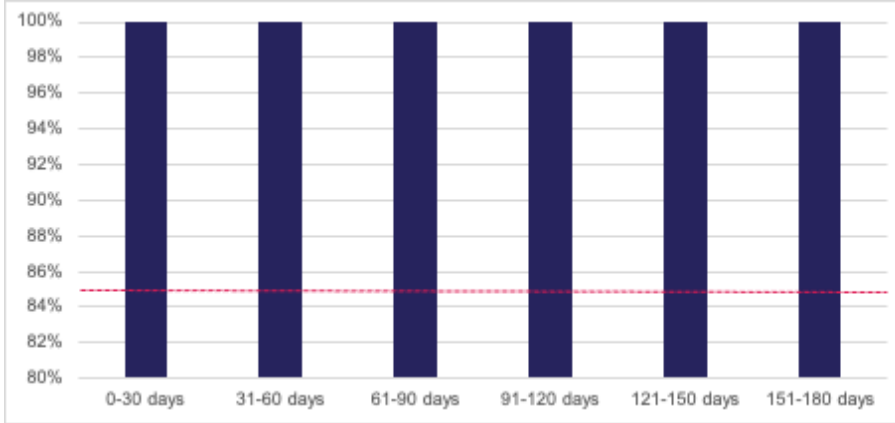


Figure 17 – Team Customer Satisfaction Scores

Learner Satisfaction

DLG also ran a session of the ID Learning Series to a test audience of training delivery and organizational development professionals in preparation for the next phase. Below is their rating and some verbatims captured from the survey form.

Survey Question	Survey Responses
Did the workshop meet your expectations?	★★★★★
Was the ID Learning Series curriculum relevant to your current and future projects?	★★★★★
Was the mix of presentations and activities suitable?	★★★★★
Do you feel competent and confident at the end of the series?	★★★★★
What did you like the most about ID Learning Series?	<p><i>"The balance between theory, discussions and practice."</i></p> <p><i>"I liked the fact that it clarified the models/concepts of ID and then turned my theoretical knowledge into practice. I appreciated the fact that the SME of each phase in the ID process was invited to share their know-how and best practices. The learning was well-structured, and a lot of feedback was received. Thank you."</i></p>
How do you plan to use what you have learned in your organization?	<p><i>"Apply towards design and redesign of capability development programs."</i></p> <p><i>"I am part of CLS so I would say that almost everything I do in terms of L&D in different programs requires a level of expertise in ID- once again, thank you!"</i></p>

Figure 18 – Learner Satisfaction Survey

Overall

Key Findings

The initial rollout of the ID Learning Series was proven successful, as shown in the team's performance data, achieving the goals and targets set from the beginning. More than the numbers, and apart from the evidently organized deployment and solutioning, what also helped this program's effectiveness was the underlying culture of teamwork, accountability, and having the mentality that "no one gets left behind." The team demonstrated these behaviors throughout the entire change process through:

- The senior leadership's support and encouragement to develop its people
- The reporting manager's willingness to devote their time to participate in the workshop as clients, unlearn processes they were accustomed to, and be diligent in following through with their direct report's performance after the training
- The participants who took on the challenge to work on their areas of opportunity and improve themselves
- The tenured designers who were willing to spend time mentoring their colleagues

The entire process of the ID Learning Series—from its birth to its implementation—is a reinforcement of the importance of investing in people. And now that DLG has solidified its people development processes, DLG will now be expanding the program to other L&D teams within Sutherland to enable them to create their content grounded on ID concepts and principles.

Enablement as the Future of the ID Learning Series

The plan is to leverage DLG's expertise and the ID Learning Series program in enabling other learning groups in Sutherland, composed of over 500 training delivery and organizational development professionals, to create their own learning programs. DLG will continue to use the task-based approach with optimizations focusing on the efficiency and effectiveness of the delivery for participants with limited to no instructional design background.



Figure 19 – ID Learning Series Updated Curriculum

The six-stage learning curriculum follows a straightforward approach, emphasizing workflows that can be applied to different programs in Sutherland and enabling learning professionals to create content that is on par with industry standards. Each stage will be modular to allow organization leaders to select and customize the program based on their needs.

Task-based Approach Optimizations

With the task-based approach proven engaging and compelling, DLG will continue to use the framework with some delivery enhancements. Each participant will also be paired with mentors to provide support, maintain consistency, and ensure continuity.

1. Prepare

Content delivery will be through a blend of self-paced interactive videos and e-learning courses to keep learning engagement and retention to a broader audience at a maximum. The Sutherland LMS will house the lessons, and participants must complete them before they can schedule and attend a live session.

2. Validate and Engage

Due to the large-scale deployment of ID Learning Series Phase 2, participants can select and attend pre-identified sessions and schedule individual consultation sessions with their mentors. Sutherland DLG mentors will facilitate these sessions.

3. Explore

Fixed deadlines are set for the participants to submit their output to their mentors for review. Participants will schedule mock sessions with DLG mentors, or they can record their mock session and submit them for review.

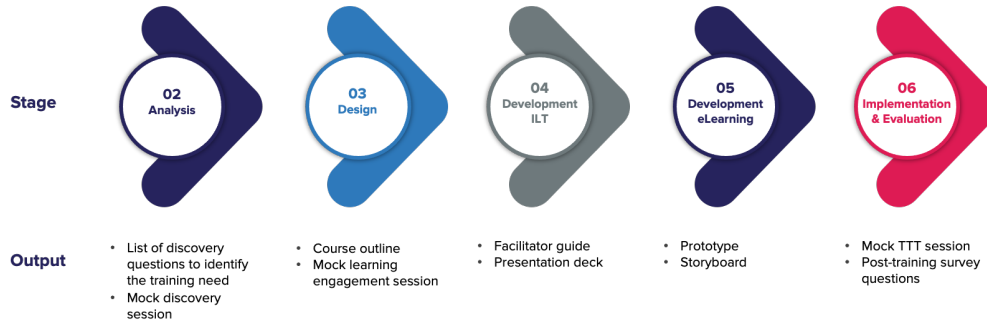


Figure 20 – Training Stages vs Trainee Output

4. Assess

DLG will implement the mentorship program to maintain consistency and continuity in participants' feedback. Mentors will schedule one-on-one feedback sessions after the output review, and their approval for each material is required before the participants can advance to the next stage.

Appendix: References

¹Schank, Roger C., Andrew Fano, Benjamin Bell, and Menachem Jona. "The Design of Goal-Based Scenarios." *The Journal of the Learning Sciences* 3, no. 4 (1993): 305–45. <http://www.jstor.org/stable/1466619>.

²Jeffrey Hiatt. "The Prosci ADKAR® Model." <https://www.prosci.com/methodology/adkar>.

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