



AGILE LEARNING

Design for Beginners

Designing learning
at the speed of change

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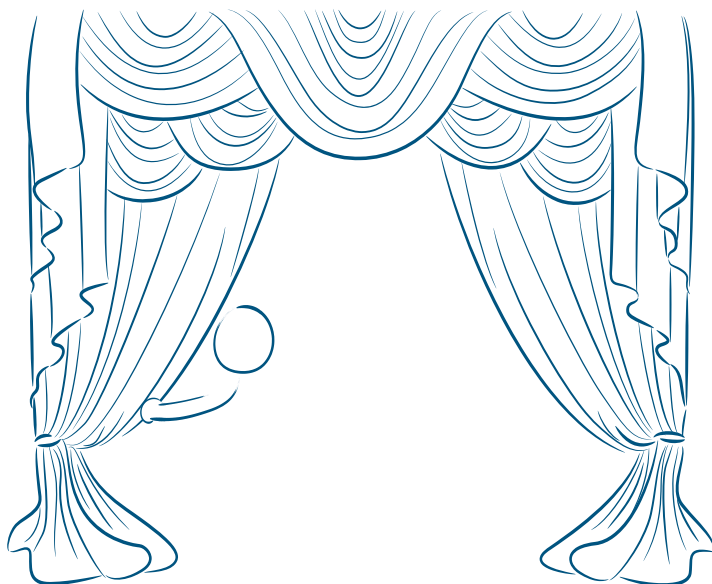
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WHY NOT ADDIE?



“Pay no attention to the man behind the curtain!”

We remember this scene from the movies, and in the past have treated our instructional design the same way. We tell our clients or stakeholders, “Don’t look at what we’re doing. Wait until it’s built until you look.” But agile instructional design is different. It’s about telling our stakeholders, “Come join me behind the curtain and work with me to create something great.”

If you are looking for a more efficient way to work with the vendors who create learning solutions for your organization, agile learning design can help. If you are a vendor who provides learning solutions to other internal or external groups, agile can help with that, too. We’ve found that

agile learning design leads to happier clients, better deliverables and a more balanced workload for our project teams and subject matter experts.

Using ADDIE methodology gives learning designers a framework we can use to manage the process of creating a learning solution and ensures that we complete the critical tasks to create something that’s instructionally sound.

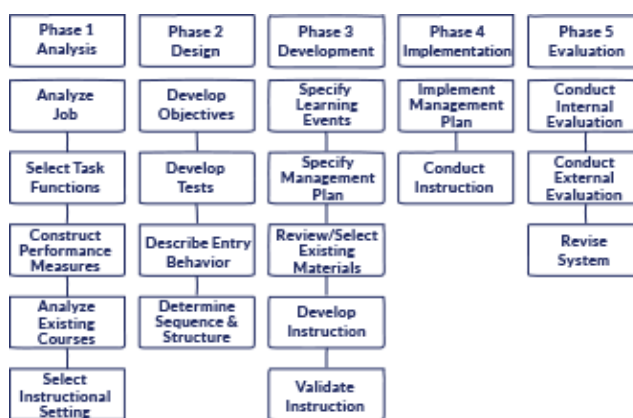


Diagram of the old, rigid ADDIE model

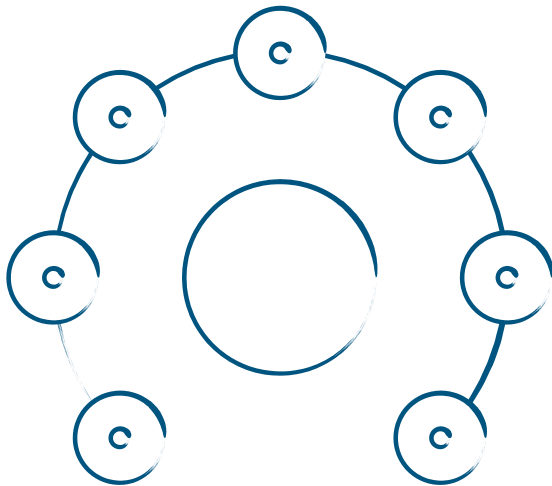
What it doesn’t do is help us manage the realities of our daily work lives where content shifts like sand, procedures are updated frequently, and leaders change direction.

Creating a linear plan at the beginning of a project with fixed milestones and timelines is usually an exercise in futility. The beginning of the project is the time when we know the least amount of information about it. So, rather than working our way through ADDIE, we’re going to complete all of the same instructional design steps, but do it **incrementally, iteratively, and collaboratively**.

Agile learning design allows you to:

- Create more creative, learner-focused courses.
- View your stakeholders as partners, not someone to keep at arms length.
- Plan for and respond to changes.
- Uncover requirements, preferences, and changes earlier in the design and development process.

Collaborative Design



Don't get too focused on any of the "jargon" surrounding agile. At its core, agile helps teams work incrementally, iteratively, and collaboratively.

Agile instructional design focuses just as much on communication as it does process, if not more. Without strong communication within a development team and with a client or stakeholder, agile just doesn't work.

Agile comes to us from the software development world, and one of the principles is individuals and interactions over processes and tools.

What does collaboration look like in a development team?

Our agile team has worked hard to become more collaborative and ensure that everyone has a voice. In the past, the individuals on the team would throw things over the fence to each other and often it would result in miscommunication and frustration.

We've created some guidelines for the team to help us ensure that we're communicating well:

- We will all plan on working in the office **at least one day a week**. We believe that having face-time aids in communication and makes it easier for us to collaborate as a team.
- We'll use **group IM chats** if there's something that we feel like the whole group needs to know or weigh in on.
- We'll **avoid using email**. It stinks as a communication tool. It slows things down and doesn't allow for conversations to happen. Face-to-face, IM, or phone are our preferred tools. (This is one of our team's favorite "rules"!)
- We want to have no surprises at internal deliverables. What that means is that the team will work together to agree on functionality, graphics, flow. We believe that we come up with better ideas when more than one person is involved in making the decision.

It's been a change in behavior and taken time, but now individuals catch themselves when they communicate in ways that aren't efficient or involve the right people.



What does collaboration look like with stakeholders or clients?

Collaborating with stakeholders means involving them in the idea creation and decision making processes. While most people like that idea in theory, it requires a different way of working.

To help your stakeholders, be sure to:

- Set clear expectations as to what you want them to review. Try giving them a checklist of questions they should answer.

Be sure to tell them what's **not** included in the review. If certain features or activities haven't been created, be clear that it's intentional, not an oversight.

- Let them know how much time it will take to look at the feature. In general, our clients have found that they are looking at smaller pieces, more often.
- Look for ways where you can have them look at things with you. Tack on 10 minutes at the end of a meeting and show them what you're working on. Or if you have regularly scheduled status meetings, come prepared with some show and tell to get their reactions and feed-back.

Incremental Design

In the past, we at BLP have sent our clients a small set of key deliverables for an eLearning course:

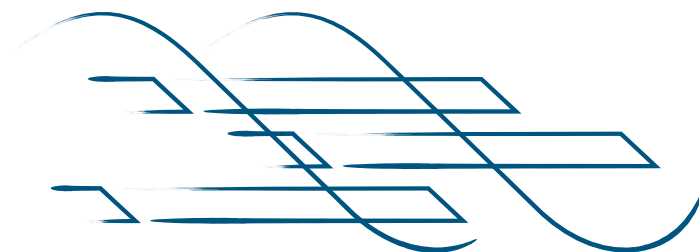
- Design document
- Script
- Alpha (first draft)
- Beta (second draft)
- Goldmaster (final)

Each of these deliverables were usually long and time-consuming to review.

Using an incremental approach, we now focus on sending clients **features** to react to rather than an entire course. We also focus on creating working examples, rather than documentation.

While we still have set deliverables, we're much more likely to send a screen shot or a piece of something for interim reaction than before.

We also share with our stakeholders rough drawings, prototypes, and mockups. We don't worry about making everything polished before they see it. As long as we set expectations well, this allows them to 1) focus on the functionality, not the graphics and 2) provide early feedback that helps us make valuable changes.



Iterative Design

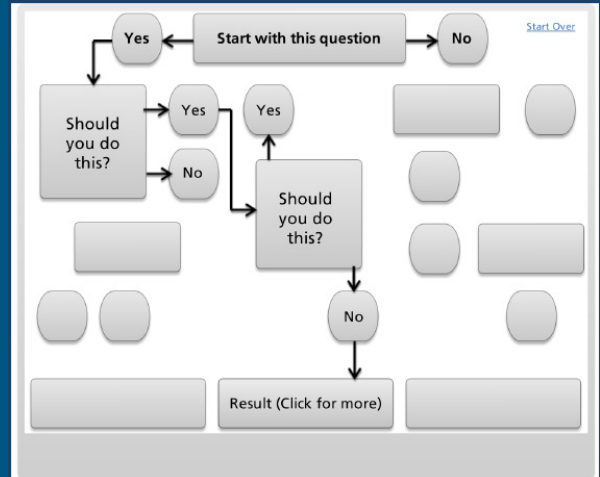
Getting that early feedback is one of the biggest benefits of the agile process. It helps us confirm that our design decisions meet the needs of the learner and organization. It also uncovers faulty logic early in the process.

Because we are providing clients with small pieces early, they can see the course or app or game evolve over time and become closer and closer to “right.”

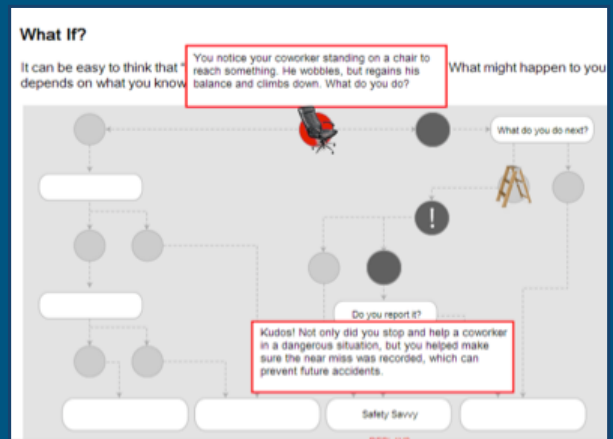
This is especially important as we develop things that are new to both

us and the clients. Creating mobile apps, games, and higher-level learner interactions requires more iteration than if we’re doing just more of the same.

Here’s an example of an iteration of an activity that occurred over several stages. While we might have gotten to the same place using our previous processes, we planned on these iterations, which made all the difference in the world.

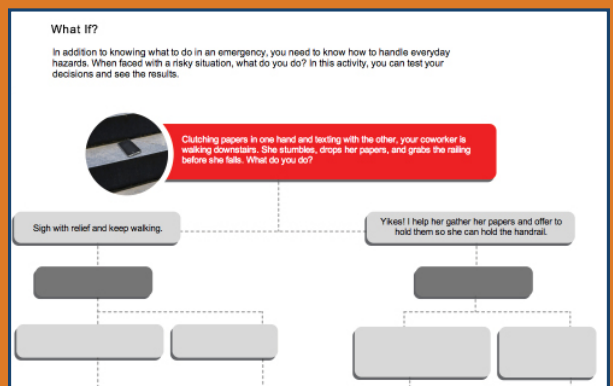


Prototype



Design Proof

Working with Agile Processes



Alpha

MANAGING THE WORK

Wanting to work incrementally, iteratively, and collaboratively is all well and good,

but at some point you have to manage the work and timeline.

Agile does not mean there isn't any planning, but rather that planning is different. Instead of creating one plan at the beginning and using your time and energy trying to hold everyone to that plan (which never works), we spend our time identifying what work is a value-add and what can be worked on based on priorities and availability.

How you manage that work is flexible and can be done using several different methods. Two that we've chosen to use at BLP include Kanban and Scrum.

Using Kanban to Pull Work to Team

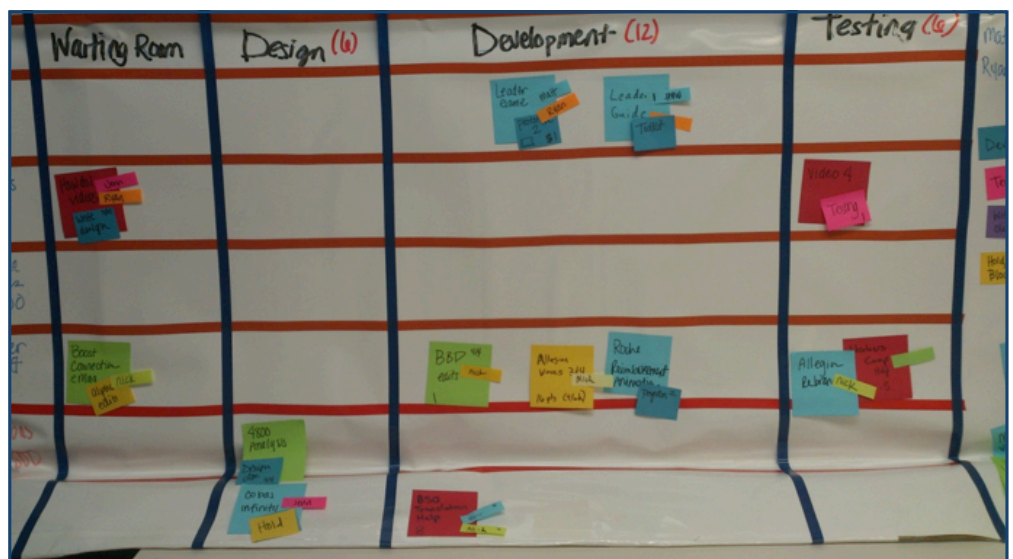
Kanban is a methodology to control the amount of work that the team is working on at any given time. It was created at Toyota to help maintain a consistent amount of work that a team can handle at any given time.

In Kanban, the team pulls work onto their plates. The team also has set work in progress (WIP) limits that tell the team and the people they work with how much work they can do at any given time. When done correctly, the team can keep the pace of their work in progress limits indefinitely.

BLP has been using the Kanban approach for our client projects. Because each project team has multiple clients and projects going on at any given time, using a Scrum type method where we try to plan out a two week period is not workable.

Kanban works really well for our project teams because it allows us to pull work into our workstream, especially when existing projects hit snags or delays.

Below is an example of a physical Kanban board our team used. Having a visual representation of what's going on helps the team stay focused and know exactly what everyone is doing when.



BLP has been using the Kanban approach for our client projects.

What About Scrum?

By Steve Boller, Market Development Director

Scrum is the methodology most people think of when they hear “agile.” At BLP, we use Scrum on our product development team. The marketing team also uses its own variation of Scrum.

The “Product Dev” team decided on Scrum because they needed a way to rapidly evolve our Knowledge Guru® product. Scrum is more focused on the user of a product than the process for creating it. Like Kanban, it allows teams to maximize resources and get everyone working together.

In Scrum, tasks are completed in short sprints of 1-4 weeks. Every sprint produces a working version of the product, and tasks are based on “user stories.” (Example: Learners will be able to play an interactive game about using widget XYZ).

The flow of work is managed with a backlog of tasks that will be completed in the future but have not been assigned. At the conclusion of each sprint, the Product Dev team conducts a sprint review to verify completion of previous stories and pull stories from the backlog to be completed in the next sprint.

Each story is assigned “points” based on how long it should take to complete. In our system, one point equals one day of work. Every team member has a certain number of story points they can complete in a given sprint, which controls the workload.

While the sprint reviews and planning meetings are time consuming, the planning of work has to be done eventually, anyway. Scrum makes the process more efficient and intentional. The team has been pleased with Scrum so far and cannot imagine going back.

“Our time is being used so much more effectively. Scrum holds us all accountable for doing our jobs. Because work is now done in two week intervals, we have the flexibility to allow priorities to change. Agile has made it possible to complete major tasks like adding SCORM to Knowledge Guru, something that was not on our roadmap just a few months earlier. This would have been very difficult with an ADDIE or “Waterfall” methodology.”

Sharon Boller,
Managing Director

Consider whether Kanban, Scrum, or a combination of the two make the most sense for your team.

GETTING STARTED

It can feel overwhelming to get started with Agile, especially when we start talking about terms like Kanban and Scrum. To help you get started, we've provided a few questions and suggestions for you to get a conversation started with your organization and team.



Focus on the mindset, not the process.

This might seem like the easiest step, but it's really the hardest. Changing the way we communicate both internally and with stakeholders requires us to develop new habits that can be hard to implement.

Talk about these questions with your team:

- Who can you collaborate with more often?
- Where are the opportunities for more face-to-face conversations?
- Who on the team needs to take more ownership for the project?
- Where does the team need to be more flexible and less resistant to change?



Have a goal

To get buy-in for agile, having answers to these questions is critical:

- Why do we really want to change?
- What does success look like?
- Does our company environment and culture support increased collaboration and flexibility?
- Is our company organizational structure and culture in alignment?
- Does management and leadership support change?



Start Small

Transitioning to agile is going to take time. At BLP, it's taken us about a year of research, discussion, piloting, and experimenting before we were ready to take the plunge as an organization. As you work through your goals and begin working more collaboratively, also consider implementing these practical ideas.

- Conduct project team daily/weekly “stand-ups” 10 minutes max (use a timer). Each person should answer these questions:
 - What'd you do last week?
 - What are you going to do this week?
 - What obstacles might get in your way?
- At the end of each iteration or significant deliverable, have the team complete a retrospective. Celebrate wins, identify what needs improvement, and leave with at least one action item.
- Create intact project teams. Allow people the opportunity to develop close working relationships, get to know each other's styles, and gain efficiencies from that knowledge.

Links

Leaving Addie for SAM

Michael Allen's book is really helpful as you think about conducting design workshops and sending deliverables to stakeholders.

amzn.com/1562867113

Agile Manifesto

The principles and practices of agile development.

agilemanifesto.org

Kanban

Learn more about this lean management system.

en.wikipedia.org/wiki/Kanban

ABOUT TIER1

Who we are:

TiER1's mission is to improve organizations through the performance of people to build a better world. We wake up every morning ready to tackle big challenges, so that more people can do the amazing work they are meant to do. When they contribute more, stretch their talents, and free themselves of workplace limits, a remarkable thing happens—they become happier and more fulfilled. And that means they reduce stress, create healthier relationships, and simply find more joy. Every day we're in business, we really are building a better world.

Our purpose is to help people do their best work—that's the lens we wear every day. As an employee-owned firm, we apply that to our client organizations, their people, and ourselves. And to do that, we embrace our core values: High Performance, Relationships, Initiative, Accountability, Value, AND Fun.

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