A City & Guilds Business

Design for Results

The Key to Designing a Results-Driven elearning Curriculum

Contents

Introduction

If you've ever been in the middle of a curriculum design project you know that it can feel like there are a million different moving parts. A well-designed learning curriculum will develop and nurture critical skills needed to achieve a specific business outcome with the most effective and efficient set of experiences. Unfortunately, whether or not a curriculum design is successful is often left to chance.

With so much on the line, who wants to take that gamble?

The good news is that developing an effective learning solution or curriculum is more attainable than you might think. In this guide, we share the steps, activities, and tools you can use to design a curriculum solution that:

- has a clear goal tied to a well-articulated business problem,
- meets the needs of your target audience, and
- specifies the most effective and efficient set of experiences to meet the goal.

Curriculum vs. Course Design

Curriculum design is the term used to describe all of the work focused on the organization and creation of instructional elements in a thoughtful and deliberate way to achieve a specific outcome. While curriculum design can happen on a smaller, single-course level, the term more often than not describes the development of a full program of several instructional elements.

Five steps to a results-driven curriculum

So where do most curriculum programs fall short? They focus on delivering content rather than delivering experiences that support and enable change in service of addressing a business need. When you lead with content, you end up with a lot of blurred lines around the scope, the audience, and the applicability of what you put into the curriculum. As a result, you may end up with a solution that falls short–it's 5 days of ILT or 10 hours of elearning–and it looks great and seems to tick all the boxes, but it turns out they're the wrong boxes. People just walk away with a lot of information in their heads but no practical skills they can implement.

When you instead lead with a business need, you can systematically break things down to make smart, focused decisions every step of the way, and have a way to measure and show the outcome of your decisions. This will ensure that you have a curriculum design in place that teaches and trains people on the skills they need to solve the business problems that need solving.

Here are the five steps you can take to get there

1. Create a clear project charter
Begin with the end in mind. This step is all about being clear on your business problem and desired outcomes.

2. Know your audience
Identify and analyze who you're targeting with this solution. How do they connect to the business problem? What do they need from this solution in order to achieve the desired outcomes?

3. Define the performance goals and barriers
For each audience segment, clearly articulate the performance goals and any barriers that need to be overcome to achieve those goals.

4. Surface solution constraints
Uncover any technological constraints, requirements for your solution like certification or assessments, or any initial ideas for the solution.

5. Envision the learning experience
Apply what you know about your problem, audience, desired outcomes, and constraints, and envision the learning experiences and interventions.

1. Create a project charter

Whether you're converting a curriculum from instructor-led to online, or building a new online or blended curriculum, the key to success is articulating the problem and desired result. And this doesn't mean jotting down fluffy statements like "our managers take on too much, so we'll train 100 managers in delegation," or "we've developed a new eight-step process and need product managers to understand it."

This is about pushing project sponsors and stakeholders to articulate the current state and desired outcomes in concrete, measurable terms. It's broadening your perspective beyond the training context and asking "why?" a lot. If your sponsors and stakeholders can't articulate their need in these terms, see it for the red flag it is and push back on whether they are ready for your team to develop a solution or not.

A well-stated business outcome has four parts to it:

- Problem Statement: What is the impetus for the initiative and what are the associated symptoms?
- Business Goal(s): What will change if the initiative (both training and other activities) is successful?
- Definition of Success: What is your definition of success?
- Measures of Outcomes: How will you measure your outcomes?

There may be more than one goal and, if so, each goal should have its own definition of success. Let's take the following example.

XYZ Fire Association is a network of fire chiefs, emergency officers, and support staff from around the world. The association's mission is to provide thought leadership, best practices, training, and other services to enhance the capabilities of volunteer-run fire-rescue organizations.

Through their network, they identified a business problem: Higher than expected volunteer turnover jeopardizes financial stability, quality of service, and ultimately, public safety. Below we share how this business problem is fleshed out using the model above:

Problem Statement

Running a fire station is like running a business: it requires business acumen and operational skills, which volunteers often do not have.

When it's not run effectively, the morale among volunteer and career staff drops, resulting in high turnover. This high turnover then requires recruiting and training new volunteers and addressing concerns of existing volunteers/staff.

Every decision and action of volunteers in key positions affects morale. Therefore, it is essential for these volunteers to have the knowledge and skills to do their job efficiently – and in doing so, keep the morale high and turnover low at the fire stations.

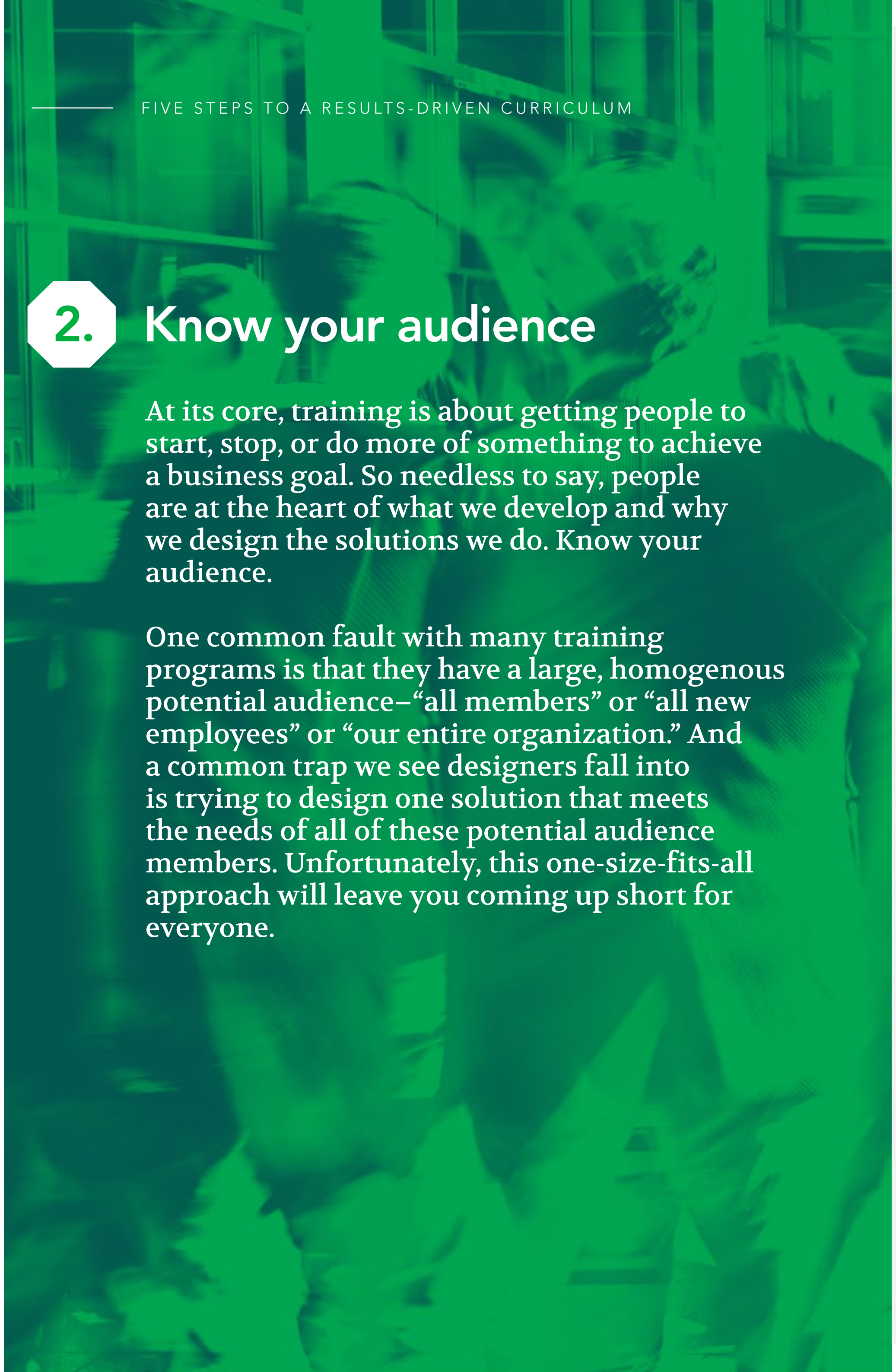
Managing Scope Creep

One of the issues we all deal with in a project is scope creep. The project charter can be an effective tool to determine if content belongs in a curriculum or not. If in doubt, ask team members to explain how content supports one of the goals. If they can't, it probably belongs outside of the scope.

Business Goal(s)	Definition of Success	Measures of Outcomes
Fire stations have an operational plan.	• Roles are clear • Staff know who to turn to for what • General operations are clear and managed appropriately	• Quarterly pulse surveys • Training time for new station management
Fire stations have a financial business process and meet financial record keeping requirements	• Every station has a picture of the costs of operation, what needs to be tracked, and how • Tax filings completed, and on time • Clear financial records are kept	• Internal annual financial process audits • Anecdotal experiences of hearing finances being discussed in more contexts
The fire station has a people engagement plan to recruit and retain volunteers.	• Recruitment pipeline is strong; the application process has less than 40% fallout • Reduce volunteer turnover within the first year of their service by 20% • Retain volunteers by providing an incentive plan	• Annual turnover rate • Application process success rate • Percentage of volunteers reaching productive status • Quarterly pulse surveys • Anecdotal observations

While these will likely get refined over the course of the project, the more clarity and specificity you have on the desired business goals and outcomes, the easier it will be for all team members and stakeholders to make project-based decisions that move in the right direction.

Publish these in an official Project Charter document and share it with everyone on your project team now or as they come on board in the future to keep all eyes on the prize.



2. Know your audience

At its core, training is about getting people to start, stop, or do more of something to achieve a business goal. So needless to say, people are at the heart of what we develop and why we design the solutions we do. Know your audience.

One common fault with many training programs is that they have a large, homogenous potential audience–“all members” or “all new employees” or “our entire organization.” And a common trap we see designers fall into is trying to design one solution that meets the needs of all of these potential audience members. Unfortunately, this one-size-fits-all approach will leave you coming up short for everyone.

The audience for this program is anyone who takes on a leadership or management role within a station. Some are firefighters who no longer want to be out in the field fighting fires but still want to help. They understand the firefighting process and all that’s needed to support that process. Others have retired from traditional, corporate-based jobs and want a way to give back to the community. If you design a training program focused on firefighting, you’re doing a great disservice to the individuals who already know about firefighting by taking their focus away from the business skills they need to learn. The same holds true if you design with only the firefighters in mind–you’ll end up alienating your retired corporate individuals with too much focus on remedial business concepts.

So, while it may seem obvious, a critical step is to identify and know your primary audience or audiences. If you have more than one, you may need to create multiple versions of your solution. Conversely, if you choose to create one solution, you’ll need to make accommodations in the design of that solution to allow your different audiences to focus on the content most relevant to them.

How to Segment an Audience

One way to segment an audience is based on roles. Role-based perspectives consider differences in individuals’ roles and how each role will relate to the program–what will they bring to the program and what will they need/want from it?

Another way to segment your audience is to consider the goals of different individuals. What will learners need to be able to do and how does that relate to what they want or need from the program?

Whether you take a role-based or goal-based approach, aim for the smallest number of groups possible, adding more only if there are important distinctions to consider as part of the design.

Personas

Personas are a great tool to make your audience groups more tangible and operational. For each audience, you'll imagine and craft a profile for a person who embodies the qualities of that audience.

Each profile will include:

- Who they are: e.g. gender, age range, job, and location.
- Background: e.g. relevant experience, education level, how they like to work, etc.
- How they spend their day (on the road, at their desk?).
- Technology they access on a daily basis.
- Their attitude towards training or education in general.
- Examples of their best and worst learning experiences.

That information will give you a general snapshot of your learners. Take some time to also think about the learners in the context of this program or curriculum by asking:

- Why will they go through this program?
- What will they want from this curriculum?
- What's their current skill level and experience with the topic(s)?
- What motivates him/her? Are they intrinsically or extrinsically motivated?

Finally, assign each persona a name and even a photo as this will make it easy for existing and new project team members to reference each audience when assessing how well the project is meeting needs and requirements.

3. Define the performance goals and barriers

Once you've documented the business outcomes and created personas, it's time to get a clear understanding of what learner outcomes are required of the solution–i.e. what you need learners to be able to do that they couldn't or wouldn't do before your solution.

Let's take a moment to acknowledge a reality here: there's a chance you've been reading up to this point with a certain project in mind and thinking "Yeah, we already have our goals and audience defined and we know what needs to be taught. We're ready to design!" If that thought has crossed your mind, here's a simple checkpoint.

Design = creating an object or experience with intention

What are your intentions for the solution? The driver for design shouldn't be content. Instead, the driver for design should be articulating the experience that will achieve a specific outcome for a specific audience. Knowing your audience isn't enough. You'll need to examine how the business goals translate into performance goals. You'll then need to explore each performance goal through the lens of your personas to flesh out how your solution might make a difference.

To achieve this level of clarity, we employ a technique we call Situation Mapping – a modification of Cathy Moore's Action Mapping approach. This is best done as a workshop in which project stakeholders and SMEs provide the details. Situation mapping is a 3-step process:

Activity	Description
Step 1:	Identify a context for which a business goal is relevant for a persona
Step 2:	List the "what they need to do" (actions) in that context to achieve the goal (the performance goals)
Step 3:	Analyze the actions to flesh out any barriers, training, and support needed

The template below may be helpful in guiding you through the process.

Activity	Description
Persona	Mary, the volunteer president
Business Goal	Reducing turnover by raising morale
Context	Mary is a newly elected president with years of experience in operations but none in leadership or business administration.
Describe a situation in which Mary has an impact on the goal. How frequently does this situation arise?	Important decisions are postponed at meetings because they do not have enough people to vote.
Are they facing this daily? Weekly? Monthly? Or very infrequently?	Most meetings, so daily, and if not daily, weekly.

In this situation, what actions does Mary need to take to be successful?

Activity	Description
Action 1	Follow the problem-solving model
Action 2	Motivate people in key positions to create effective meetings
Action 3	Influence members to come to the meetings
Action 4	Coach leaders in how they can motivate others

Does Mary take this action today? If not, why not?	Action 1: Follow the problem-solving model	Action 2: Motivate people in key positions to create effective meetings	Action 3: Influence members to come to the meetings	Action 4: Coach leaders in how they can motivate others
Is it a: **Knowledge Problem:** They don't know that it's expected or recognize the opportunity? They don't have the knowledge about how to find answers? **Skill Problem:** They don't have the required skills? **Motivational Problem:** They don't see value in doing it? **Organizational Problem:** They lack support, process, or tools to act? **Something else?**	Mary was always quick jumping into fixing mode. She's not aware of the problem-solving model, or the benefits of the "size-up" before you act approach.	Mary is aware that she needs to bring her team on board but they're sceptical, based on their previous experience. Mary does not have the knowledge and skills of how to motivate people.	Mary has always been using personal power but she's not aware that there are other ways to influence people.	Mary is a skilled firefighter, where roles and responsibilities were clear. Mary used peer coaching instantly before, and she's good with people one-on-one. However, she needs to practice not to dominate the conversation with "If I were you…"

Note: This is a good time to ferret out if it's a training issue at all.

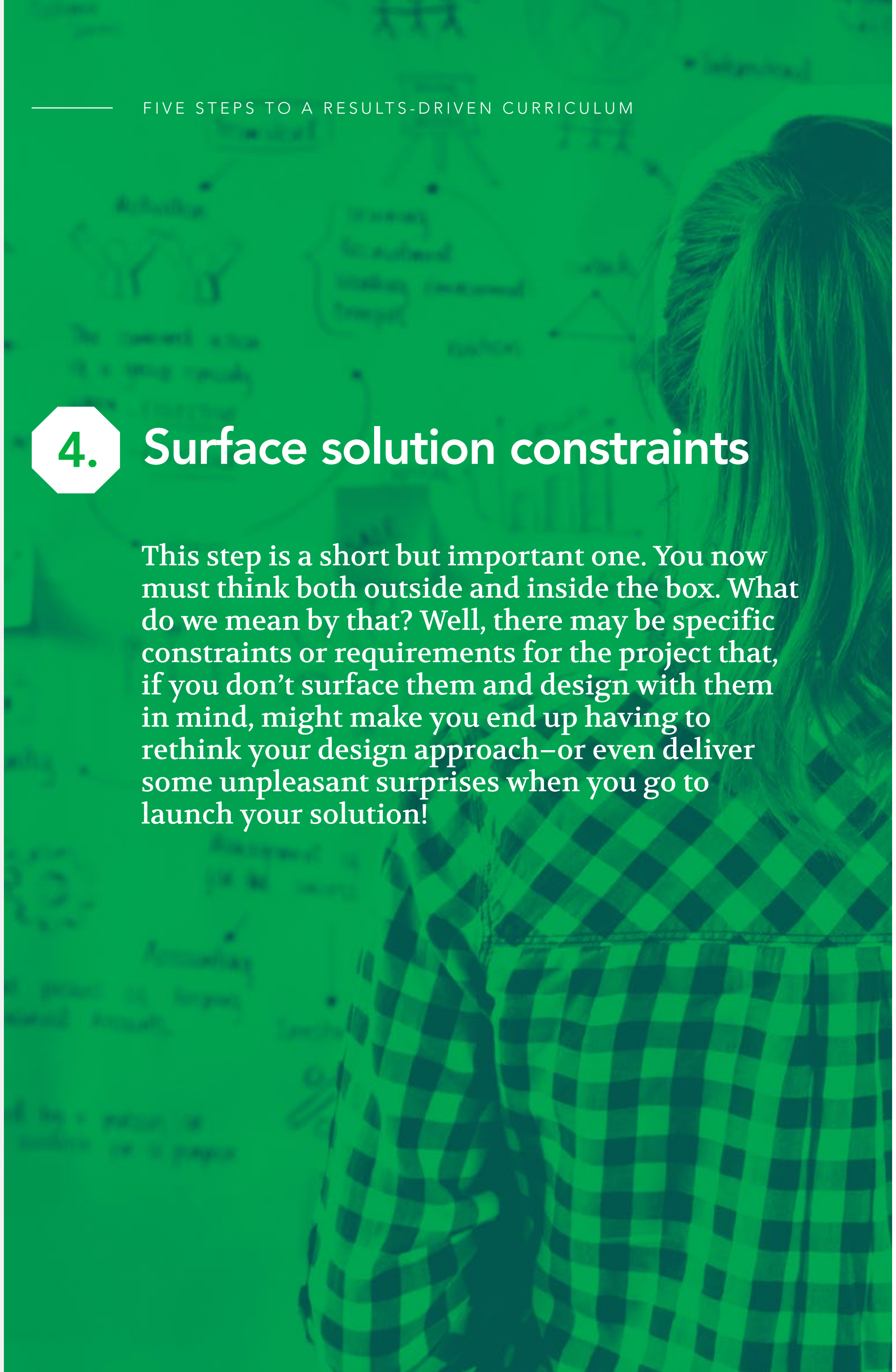
Question	Action 1: Follow the problem-solving model	Action 2: Motivate people in key positions to create effective meetings	Action 3: Influence members to come to the meetings	Action 4: Coach leaders in how they can motivate others
If Mary already takes these actions today, where does she struggle? What mistakes does she make? **If she's not doing these actions, what is she doing that she's not supposed to be doing**	Mary is not using the problem-solving model. In fact, she's trying to fix things quickly without knowing the root cause of the problem. For example, she requested to have fewer meetings to motivate people to show up.	Mary has regular meetings with her leaders to discuss issues but she's taking on too much herself. She needs to delegate and build trust.	With less frequent meetings scheduled, Mary personally asked members to come to those and vote on important decisions. This seemed to work in the short term only.	Mary needs to practice active listening and learn coaching techniques to address specific behaviors.
What are the consequences of Mary not taking this action or making a mistake? For the organization? For Mary?	Fixing the wrong things further decreases morale and trust in leadership.	While Mary can do a lot, if she's not able to rely on her team, people might feel that their contribution is not valued. Spending energy on the wrong things (while by-laws are outdated, for example) can send the message that leadership does not prioritize.	By not addressing the main issues of WHY people are not engaged (no agenda, no follow-up, etc.), fewer meetings just make the case worse. Important financial decisions must be made on time.	Without effective coaching people revert back to old behaviors, which obviously did not work for the organization Coaching is also important for Mary to build trust in her team.

Question	Action 1: Follow the problem-solving model	Action 2: Motivate people in key positions to create effective meetings	Action 3: Influence members to come to the meetings	Action 4: Coach leaders in how they can motivate others
What support/ training exists today for Mary to do these things?	This is new. No training exists yet.	There is an off-the-shelf learning about leadership and management but not for the administration.	A job-aid was created a long time ago. Nothing else.	There is a two-day ILT program covering coaching, but it's rarely offered.
What support/ training does Mary need to do these things in the way you want her to?	Basics of problem-solving with practice of application.	Audience-specific content covering how to lead through engagement.	Basic knowledge of group dynamics and motivation.	An action-oriented, online spaced learning program balancing best practices and applications on the job.

Repeat this process for each persona to get a clear understanding of what each audience group needs to be able to do. You may consider repeating this process further if you have more than one business goal. Just keep going until you have a complete picture. This is the most time-consuming part of the upfront work, but it pays off. As you go through this process, you'll quickly see how easy it is to design a solution that meets your audiences' needs, and that guides your stakeholders and SMEs to determine what content is important and relevant to achieving your performance and business goals. This exercise also helps you identify where you have overlaps in content for the different audience segments.

Next, you need to determine learner paths. For example, will there be a pre-assessment? Will everyone go through the same experience, or will there be an option to select a role in order to view content specific to that role? Answering these questions requires having a clear understanding of the intersections in content, and that clarity should come from your situation mapping. For example, if you find as you do your situation mapping that more than one role needs the same foundational training to perform their job or tasks properly, you can think about how to structure your curriculum in such a way that the two roles go through the same foundational training before branching off into training specific to their role.

Finally, make sure to document your performance and learning goals for each audience segment and share that back with your stakeholders to ensure alignment.



4. Surface solution constraints

This step is a short but important one. You now must think both outside and inside the box. What do we mean by that? Well, there may be specific constraints or requirements for the project that, if you don't surface them and design with them in mind, might make you end up having to rethink your design approach–or even deliver some unpleasant surprises when you go to launch your solution!

Before you move into envisioning your solution, consider asking your stakeholders about:

Technology requirements:

- What technology is already in place that we need to keep in mind and work with as we design a solution?
- What existing technologies or knowledge sharing platforms could you leverage, and what new technologies have you been considering?
- To what extent are you open to us suggesting other technologies and to what extent do we need to design specifically for the technology you have in place?

Compliance, assessment, and/or Certification requirements:

- Are there any compliance requirements we need to consider or plan for?
- Are there any assessment and/or certification requirements we need to consider or plan for?

Source content:

- To what extent do you anticipate that the content we'll require for this project will be readily available in existing materials (and, if so, can we start reviewing those materials)?
- For content that doesn't exist, will we have access to subject matter experts to gather the content?
- Are there any content gaps that you feel can't be filled by internal resources (e.g. will we need to consider "off the shelf" content)?

Finally, take time to ask your stakeholders if they have some initial ideas or hypotheses regarding the solution. Giving them an opportunity to share ideas puts you in a better position to either integrate those ideas (assuming they make sense and are right for the solution) or be able to say why you chose to go in a different direction.

Capture all of what you learn in a "Solution Constraints" document that you can share with the full team to ensure alignment.

5. Envision the learning experience

You've gathered all your requirements, and you've determined what is needed to achieve the objectives you've set for the project. It's now time to envision your solution. There's no "one way" to approach this step, but we have a proven methodology that makes coming up with a full program or curriculum solution a bit easier to tackle.

Plan to iterate

A full curriculum usually consists of many different types of learning experience. Break your full design effort down into more manageable design sprints and take time with each sprint to validate against the requirements.

Begin with the big picture

Let your first sprint be about developing the big picture–or what pieces make up your solution and how they connect together for the complete learner journey.

Steps in a Learning Journey

While every learning journey will be a little different, they will typically address one or more of these needs:

Engage	How ready is your audience to move towards a change? Do they need to be convinced? Do you need to capture their attention? Or do they already have the intrinsic motivation to go on this journey?
Diagnose	How aware is your audience of their current performance and abilities? Do they have a solid understanding of their strengths, weaknesses and gaps?
Learn	What sort of learning solution is most appropriate? Is it a knowledge or skills gap, or does a behavior need to change?
Apply	How difficult will it be to apply the knowledge or skill back on the job? How much practice, help, and support is appropriate?
Assess	How will you determine if the desired outcome was achieved?
Reinforce	How will what you teach change over time? How important is it to keep the content top-of-mind?

Go back to the performance goals you identified in Step 3, and keep in mind the constraints you raised in Step 4. Now you're ready to start mapping out the learning journey in terms of the kinds of learning experiences, support resources, assessments and other parts of the solution needed to address the needs you surfaced. To help you figure out the "right" pieces to have in place, consider these questions:

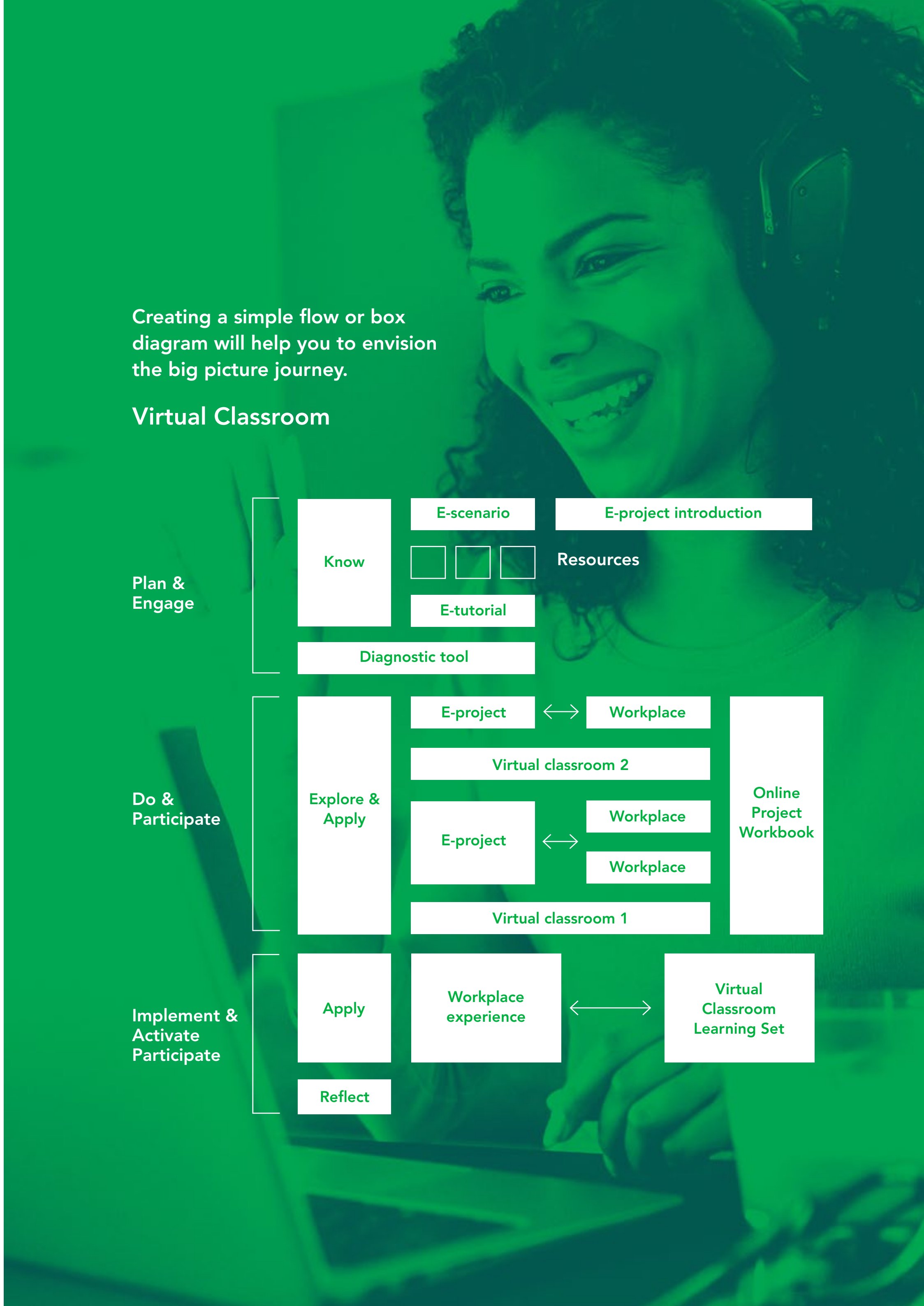
- Where do you have more of a need to motivate and engage learners? Will there be rollout meetings or some other face-to-face or virtual introduction to the program?
- Where do you need to build self-awareness of individual strengths, weaknesses, or gaps?
- Where do you need to build competence (e.g. knowledge and skills)?
- Where do you need to help learners apply what they have learned?
- What kind of assessment or certification is needed?
- What part of your solution will help to reinforce what's learned?

It is helpful at this high-level stage of learner journey development to stay as platform- or tool-agnostic as possible until you have the ideal journey defined.

Keep yourself at a high level. The details will come later.

Creating a simple flow or box diagram will help you to envision the big picture journey.

Virtual Classroom



After mapping out the learner journey, take time to validate it. Consider each audience segment or persona. Does the journey account for meeting the needs of the different personas? What parts of the learner journey are the same for all and what parts need to be more personalized to a role or audience segment?

Finally, gather feedback, then iterate to consider all of the major needs and requirements in your solution before you move forward into more detailed design.

Define each piece of the puzzle

You have the big picture and now it's time to divide and conquer. Break out and define each piece of the puzzle, one at a time. For example:

- Are you building an initial self-assessment? How does it impact what a learner sees for the rest of their learning journey? How will it be administered?
- How are you planning to measure outcomes? How will that be built into your design?

Set yourself a plan for which pieces of the puzzle you'll iterate on each day until you've been through at least one pass on each piece of the puzzle. As your design for each piece gets clearer, take time to build out wireframes or rough visual representations of each piece. Then, bring in some fresh eyes to review your ideas and see what questions come up. Often this can uncover pieces you might want to consider as part of your learner journey that you may have missed, like a program overview or tutorial.

Iterate the designs for each piece of the puzzle until you feel confident you have a solid picture of each piece. At this point, you are still not yet wedded to particular technology delivery platforms, so your designs may not reflect the full technical and production details needed to go into "build" mode, but that's OK. Save that for the implementation phase. Your goal here is to have a clear enough picture to tell a story and to help you map out (in later steps) the kinds of experience you need in your solution, how many, and what level of effort will be required to build the full program.

Apply technology smartly

The final step in the design process is to decide on the right technology to bring it all to life. The use of technology is about scale, consistency, resources and the efficacy of potential approaches.

What tools will work best? Revisit any constraints you surfaced earlier to make sure you're accounting for those.

Bring it all together into different learner journey stories

Finally, you move from detailed design mode back to the learner journey.

Start by refining your high-level learner journey map that you created earlier.

Then, take each persona and create a walk-through of key moments in that learner journey. Tell the story of how the individual experiences the program from start to finish.

Do this for each persona. When complete, share the learner journey stories with your stakeholders and others for feedback and validation. Discuss the recommendations for what tools to use to build out each piece.

Then, iterate and refine until you can consider the design approach "final enough" to map out the curriculum in detail and create an implementation plan.

Design –
the never-ending story

You've done the hard work and have a well-articulated design for a solution that is specific to the business need, the audience, and the performance goals for that audience. It's time now to turn ideas into reality.

Remember to avoid feature and content creep and hold true to the project charter and the performance goals, making careful decisions to only cover what helps to accomplish your goals.

And when all is built and deployed? It's time to assess the business and performance goals. You may be able to intuitively assess to what degree your solution met all of your goals in the end, but intuition isn't enough. By following this process, you have put yourself and the project in a position to be able to measure and track some real data to help you evaluate the effectiveness of your solutions. Take time to look at data and ask questions such as:

- Are you getting the completion rates you had hoped for?
- How are learners performing within the curriculum?
- How are your other metrics? Are they trending in the way you had hoped?
- What kind of impact is the training having?

And what if your investigation uncovers some problems? Do you need to scrap the whole thing?

Fortunately, when you employ this five-step systematic approach, you don't have to throw the proverbial baby out with the bathwater. The real beauty of this process is that, because you worked things through so systematically to begin with, it will be easier for you to figure out what parts of your curriculum you can deconstruct and reconstruct as you weigh any new insights or requirements that surface from your data.

Start designing for results at your organization

Designing curriculums correctly using the multi-faceted design strategy we've outlined above will help you deliver measurable business impact.

What's more, designing an impactful solution will lay the foundation of a thriving learning culture within your organization.

By approaching each project with patience, using a systematic approach, and with the end in mind, the result with be a truly transformational learning experience.

At Kineo, we've been honing our design skills for over 15 years–140 if you take into account our parent company. We've helped some of the world's largest brands including SAP, Rolls Royce and BP transform the way they train employees by helping them design and implement innovative curriculums to meet their unique needs.

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