Phases of Course creation

Phase 1: Analysis Phase	
Kick-Off Meeting	• Ask specific questions about the client's performance goals and expected outcomes. • Identify any issues, challenges, or blocks to achieving those expectations. • Explore assumptions that can and cannot be made about the role, employees, or processes. • Ultimately, you are trying to find out what problem is being solved and what information needs to be gathered. Use ***1.01. Discovery template***
Needs Analysis	• Gather data through surveys, performance task analyses, and current and historical performance metrics. • Include role tenure in surveys. • Include a range of rated employees - A, B, and C performers - in the task analyses. • Gather current and historical Key Performance Indicators (KPIs) metrics and current measurements associated with the problem.
Data analysis	Analyze all materials: • Performance metrics - look for trends and aberrations. • KPI data to identify employees for analysis. • Management perceptions of performance in relation to KPI data of performance. • Task analysis data for trends and aberrations. • Stakeholder expectations v. reality. • Create reports and findings.
Analyze previous training (if applicable)	• Analyze effectiveness of previous training. What performance objectives were used? Were they met? Were stakeholders' expectations met? • Analyze design of previous training. How do performance objectives connect with training materials? How were the trainings organized, timed? • Analyze validity of previous training. Is the content current and valid? Use task analysis to identify trends and aberrations.

Conclusion of analysis	Determine the most effective approaches to meet the stakeholder's expected outcomes. Approaches may include: • Training event/s. • Email • Curriculum of courses • Job aid, update notice, etc. NOTE: If a training event is not warranted, explain why in a conversation with the stakeholders. Be prepared to walk through your reasons and offer alternative solutions and ideas. Be prepared to offer solutions and ideas for what would be an appropriate alternative to creating training.

Phase 2: Design Phase	
Create Terminal Performance Objectives (TPOs)	• Based on Phase One analysis, create TPOs that establish the degree of competency required. • Use Bloom's Taxonomy as a guide for establishing that degree. TPOs should use action verbs that are measurable and will be measured. • Action verbs dictate how competency is measured, so make sure they apply to the modality of training, e.g., don't use "discuss" in eLearning. • Measurements should be objective and reproduceable.
Determine delivery methodology	The TPOs and their measurement determine what the most effective delivery method (modality) will be. They are: • Synchronous or asynchronous • Instructor Led/Virtual Instructor Led (ILT/VILT) • eLearning • Blended • Hybrid
Create Training Design Plan	The **Training Design Plan** lays out the order in which the TPOs will be delivered and what Enabling Performance Objectives (EPOs) are needed to develop competency with each TPO. • Determine how the training will be divided into courses, modules, and lessons, if necessary (content drives duration). • Determine what will be the most effective measurement devices and knowledge checks correlating with the modality. *Use **2.01. Training Design Plan template***
Create measurement plan	For each TPO, there should be a statement of how it will be measured and evaluated, and what the standard of competency for each will be. *Use **2.02. Measurement Plan template***

Develop and Deploy (DnD) Plan	This document provides the order and plan for the development of the training. This sets the order, dates, the stakeholder responsibilities, and bench marks for getting the course from the beginning of design to the maintenance cycle. Use ***2.05 DnD Plan***
Scope of Training Plan	The **Scope of Training Plan** lists the specifics about the project. The details in this document are agreed upon by all approving stakeholders. Use ***2.04. Scope of Training Plan template***
Executive Overview	The **Executive Overview** is a high-level quick reference document about the curriculum, course, or module the project is centered around. It contains the following: • Purpose • Results • Objectives • Measurements • Outline of TPOs in order of presentation Use ***2.03. Execute Overview template***

Phase 3: Development Phase	
Deliverables	• Deliverables listed in the **Scope of Training Plan** will be approved and delivered by the agreed upon deadlines. • Any change to what will be delivered and/or deadlines will need to be disseminated to all stakeholders for approval.
Create Training Outline	The Training Outline is the document created from the **Training Design Plan,** where the TPOs and EPOs are ordered in decimal outline format for ease of readability and the development of content. Name it **:: course name :: Outline**.
Create Content	Take the Training Outline, "Save-as" into the **:: course name :: Outline – Content**. This document: • Is used by SMEs for gathering the content that needs to be delivered. • Becomes the approved content of record once it is approved by all SMEs. • Is the first document updated if there are content changes. • All content should be written in a manuscript format, like a textbook.

<table>
<tr><td>Create Lesson Plan</td><td colspan="3">Creating a lesson plan is only necessary if this training is going to be audited or approved by an outside third-party organization, like a government regulatory organization that will approve the training for continuing education credit.

It could also be useful in advertising the course to different organizations. It is more detail than an Executive Summary, but less detail than the training plan.

The lesson plan blends the Schedule and the Training Plan. It briefly explains what will be covered by each day by module/lesson. You do not need to go into detail about each TPO, but it should provide the reader with an understanding of what to expect from the class and what the expected performance outcomes will be.</td></tr>
<tr><td>Instructor-led
Create Instructor Guide (IG)</td><td>Copy-paste all of the content into the Instructor Guide, add instructor notes, activities, job aids, strategies, scenarios, background information, definitions, references and citations, etc. This document becomes the foundational document and the document of record for all iterations of delivery. It should look like a textbook that a teacher uses.

If you have Adobe InDesign:
3.01.1. IG-FG InDesign template

If you have MS Word:
3.01.2. IG-FG Word template</td><td>eLearning
Create Storyboard</td><td>Creating a storyboard is not creating the product. It doesn't need to be a complete product with only triggers not provided. It should consist of four things:
1. A representation of the screen template with the content to be on the screen
2. The location of the screen in the final product
3. Specific interactions and triggers for that screen, not including global interactions
4. Voiceover content for that screen</td></tr>
<tr><td>Create graphics, scenarios, and ancillary materials</td><td colspan="3">If your course is going to have scenario-based training, develop the scenarios so you have a better idea of how long each block of training will be. Also, you will have indicated activities in your Instructor Guide and you may need to change parameters of your activities in the IG after you finish developing your scenarios.
Use 3.02. Scenario template</td></tr>
</table>

<table>
<tr><td>Instructor-led
Create slide deck</td><td>Now you create the slide deck. Once you have completed your slide deck, make each slide an image and import it into the IG as a thumbnail to align with the content that is represented by the slide.

Use 3.03. Slide Template</td><td>eLearning
Create final product</td><td>You use the storyboard for final approvals to build the final product.

The final product should include everything that was planned, to include all interactions, all voiceover, and all graphics.

Then final product should go through several reviews by different levels of personnel – from teammates to stakeholders – preparation for deployment.</td></tr>
<tr><td>Create Participant Guide</td><td colspan="3">The Participant Guide is nothing more than the IG but without all of the instructor information. You remove all of the instructor notes, but you leave the instructions for the activities and you leave the discussion questions with lines to take notes with.
• If you are using the InDesign IG template, the Participant Guide is the left side of the document. Copy and paste the right-side content to the left side and make the adjustments.
• If you are using the Word version, “Save-as”, change IG to PG in the title, then make all of your adjustments.</td></tr>
<tr><td>Create Measurement devices</td><td colspan="3">Based on the action verbs from Bloom’s Taxonomy, develop assessments that adequately measure performance of participants.
• Lower complexity verbs (remembering) can be measured by multiple-choice quizzes.
• Some verbs in understanding and applying can be measured by a multiple-choice test, but not all. Verbs like “discuss” or “describe” require essay questions and rubrics.
• The more complex the verb, the more complex the measurement device should be.

Evaluating course performance usually involves creating surveys, but can include delivering assessments at different intervals of time after training has completed. The Learning Transfer Evaluation Model is superior to Kirkpatrick’s Four Levels for much of this.</td></tr>
</table>

Create schedule	Content dictates time in course. Analyze and document the content and activities using the **ILT Timing** template. Time presenting is based on 930 words per 5 minutes. *Use **3.04. ILT Timing template*** If you need to create a **Training Schedule**, the ILT Timing document will provide the breakdown of modules and lessons. *Use **3.05. Schedule template***

Phase 4: Deploy	
Validation	Every course should be validated. Validation has three phases: 1. Timing and content 2. Content and efficacy 3. Efficacy If the course is a one-off, there should be someone validating the course by attending and monitoring adherence to the plans and materials. Courses may seem to be a one-off, but then be adopted more regularly. Validation contributes to continuity, consistency, and accountability. *Use **4.01. Validation Docs template***
Updates and changes	Updates and changes will be tracked via the **Training Revisions Template**. *Use **4.02. Training Revisions template*** **Never save over an older version – always create a new version when making substantive changes!** For all revisions, make sure the Change Log in the Training Plan is updated. Establish a versioning system, for instance v.20210729-RJ is a system to denote the date the version was ***approved*** and the initials of the person completing the changes. Any substantive changes to content should warrant a new validation.

Phase 5: Course maintenance cycle	
Level 1 revisions	• **Level 1** revisions constitute typos, grammar, broken links, and other adjustments that do not fundamentally change the content of the training products. • **Level 1** revisions will be performed the first week of a new quarter.
Level 2 revisions	• **Level 2** revisions impact the structure of the content without changing the performance outcomes for the training. These revisions include adjustments to processes, changes to screenshots, additional information, or correcting incorrect information. • **Level 2** revisions will be done during the first week of each month.
Level 3 revisions	• **Level 3** revisions fundamentally change the content. This may be new processes, major changes to processes, software adoption or elimination, etc. These changes will alter the performance outcomes and the performance of employees who take the training. • **Level 3** revisions will be done as needed, depending on the urgency of the changes and requires an analysis of the impact on training and material. • A new validation should be performed on the affected material (by segment).
Level 4 revisions	• **Level 4** revisions are based on a full review of the material, how often the training is used, analysis of efficacy and accuracy, and impact on learners and the organization. If it appears there are no changes or adaptations to make, it will be either left as it is or it will be considered for archiving (if it is not being used). • **Level 4** revisions will occur on a yearly basis on the anniversary of the first iteration of training. • May constitute a new validation if there are **Level 3** changes to the material.