Instructional Designers in Corporate eLearning: Multiple Roles, Multiple Challenges

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The Different Roles of Instructional Designers

The purpose of this presentation is to examine the expanded role of the corporate eLearning instructional designer, the challenges that s/he faces, and how to succeed.

According to ASTD, training delivery via learning technologies has increased from 15.4% in 2002 to 23.6% in 2003. Use of learning technologies is projected to keep increasing among companies surveyed (ASTD State of the Industry Report 2004). As eLearning has evolved, the instructional designer position has been in the most demand, compared to other eLearning positions (Currin, 2003).

Historically, instructional designers have been responsible for planning the instruction so that the learner can process and learn the material using cognitive strategies (West, Farmer, & Wolff, 1991). Now, however, there is more demand for instructional designers that can rapidly learn and adapt to new technologies when developing new media (Liu, Gibby, Quiros, and Demps, 2002). In the field of corporate eLearning, almost all instructional design positions require knowledge of Flash, and other new media technologies (Currin, 2003). So, instructional designers are also multimedia developers. According to Liu et. al., (2002), instructional designers are now needed to perform the standard instructional designer tasks – working with Subject Matter Experts (SME’s), conducting task analysis, writing objectives. But, they are also expected to do more, including project management, create graphics, animation, and code, train others, and stay current with technology.

As instructional designers move into corporate eLearning positions, what challenges will they face? For those instructional designers just out of school, what differences exist in a corporate setting? How can they prepare for them? What expectations will a corporate employer have? What skills transfer?

M&I Support Services Corporation

M&I Support Services Corporation (M&I SSC) is a wholly owned subsidiary of Marshall & Ilsley Corporation. M&I SSC exists to support the functions of the bank and provides technical and systems training to employees. In 2003, M&I SSC purchased a learning management system and prepared to implement eLearning courses to over 8000 employees across the nation. In order to create customized eLearning courses, I was hired as their eLearning instructional designer.

This presentation discusses some of the challenges encountered as M&I has implemented eLearning corporate-wide. During the course of this implementation, many different roles emerged for the instructional designer can face, as a result of some of these challenges. These roles include web designer/developer, technology ambassador, performance technologist, multimedia developer, and project management.

Challenges and Solutions at M&I

Instructional design skills can help meet the demands of all these roles, and provide solutions (not always training) that work in a low-tech environment. One of the greatest challenges at M&I is the newness of eLearning and, even, instructional design. Instructional design provides advantages for training...
departments in that it formalizes a development process, standardizes instructional materials, and, by creating objectives, can align training with business goals. However, as the instructional design process is being used with different clients in various business lines at M&I, different roles for the designer are emerging.

At M&I, the corporate intranet plays a prominent role in the daily lives of our nationwide employee base. One of the first projects was to develop a website for one of our business lines. The current low-tech, high-touch environment at M&I clouded the initial goal of the website. It was difficult to separate the medium from the message. Educating the clients as to what can and cannot be done on a website was an ongoing process, as well as what should and should not be done on a website. This project required the instructional designer to assume the role of web designer/developer, as well as technology ambassador.

Although formal web design experience is not necessarily part of an instructional designer’s curriculum, by using the analysis process of instructional design, the goal was discovered and the organization and structure of the website could be created to support the goal, similar to creating goal steps, subordinate skills, etc. The website launch was successful, and the clients were very satisfied with the end product.

Often times, training is viewed as the solution to every problem. However, data gathered during the analysis phase can indicate other environmental factors that prevent the desired performance. In the role of performance technologist, the instructional designer can relay the information gathered about learners’ current knowledge, skills and attitudes. For example, at M&I, during the learner analysis and context analysis steps, it was discovered that the reason why bankers weren’t selling a particular product directly to the customer was because they were being incented to make a referral. However, at the same time, there was a skills gap. A two-fold solution was proposed – remove the counter-incentive, and create online training to address the specific skills gap.

In some corporate environments, instructional designers have multimedia developers that will take their storyboard and develop the course. However, this is not always the case. Instructional designers are challenged to not only design, but also develop the course. While some designers may come equipped with a complete development skill set for online courses, some may not. The skillsets in the eLearning team are varied and disparate with regards to graphic design and online presentation. How do designers create effective training online that will meet the business timeframe? What tools can assist this process?

At M&I, the creation of an instructional design guidebook assists in maintaining design standards for each instructional project. For each project, the team member works through this instructional design guide, completing the instructional design steps along the way. This helps other team members learn the instructional design process, while still making progress on their projects. It also allows best practices to be discussed and agreed upon. In addition, it ensures consistent quality between projects as all developers move through the formative evaluation step.

Another tool is the storyboard. Instructional designers often use storyboarding as part of their “design” step. Storyboarding allows the designer to design the training, and hand off the storyboard to a team member that may be more skilled in graphic design or more technologically equipped to place the instruction online. At M&I, our timeframes are tight and ever changing, storyboarding plays to each team member’s strength to get the instruction developed quickly.

Since eLearning and instructional design are still fairly new to M&I, the role of the instructional designer on different projects is not standardized yet. On some projects, clients simply want to “web-ify” their existing word documents. In this scenario, the designer is nothing more than a developer – simply putting content online. Another example is putting a face-to-face course online. In this scenario, people want the
training delivered the same way – just online. Attempts to re-design sometimes are met with resistance or are simply unrealistic due to time constraints.

On other projects, clients expect the designer to manage the entire training initiative. It is in this latter scenario, that the full value of instructional design is realized. For example, M&I was rolling out a new product and brought training into the project early, while the product was still being designed. This allowed the instructional designer to create a training plan that addressed the need of all audiences in advance, and create training that met the need of all audiences. By following the instructional design process, management could see the training plan in advance and different aspects of the project could be coordinated for a successful rollout.

Conclusion

So, what is the role of the eLearning instructional designer in the corporate world? It’s all of the roles we discussed and more. As eLearning at M&I SSC continues to grow due to the increasing demand, more challenges are being presented– including developing learning objects, creating better evaluation, the creation of just-in-time training, and the potential of mobile devices.

In conclusion, eLearning instructional designers today need to have aptitude and appetite to learn how to perform effectively and efficiently in these different roles. They should be able to solve problems on a micro and macro level, as well as be extremely flexible. They should be familiar with different software for eLearning, in particular software that will meet their needs in their environment. They should be willing to learn as they go, since eLearning is a changing world. Above all, they need to be disciplined to follow the instructional design process and communicate their findings to their clients to make sure the true needs of the learners are being met.

References


Biographical Sketch

Hope Liu is the eLearning Instructional Designer for M&I Support Services. She is involved in numerous projects to meet the needs of commercial banking, retail banking, and other business lines at M&I. She earned her doctorate from Virginia Tech, which focused on developing an online course using a modified version of Keller’s Personalized System of Instruction. She was also the administrator of Virginia Tech’s Instructional Technology Master of the Arts online program. In 2002, she was a co-recipient of a grant funded by the American Sociological Association, to investigate student perceptions of eLearning.

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