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Adapting the ADDIE Model to Stay on Track for Training and Documentation Projects

S E T P O I N T ™

Setpoint provides lean industrial automation equipment customized for specific manufacturing processes.

Setpoint has utilized McKinnon-Mulherin's expertise in writing to enhance documentation packets, training manuals, and other smaller projects. We thought it would be interesting to have a perspective from one of our vendors highlighting their processes in design and project management.

Adapting the ADDIE Model to Stay on Track for Training and Documentation Projects

Many companies, including McKinnon-Mulherin, Inc. (MM), follow some variation of the Analysis, Design, Development, Implementation, and Evaluation (ADDIE) model to create documentation and training for clients. In the information design world, a final product—whether a guide, a job aid, or web-based training—is often called a "deliverable." Each step after the Analysis Phase builds on the previous step and helps MM to stay on schedule and within budget to meet our clients' expectations with high-quality deliverables.

Although our process is straightforward, we recognize that client needs vary. Meeting our client's needs, therefore, sometimes requires flexibility—and clients often ask us to expand and contract project phases to work within the time, budget, and resource constraints that they may face. The ability to be flexible without sacrificing quality differentiates us from many of our competitors and also contributes to our high client retention rate.

For example, some clients may need to have information gathered and a template built. They may then want to develop their own content or training. Other clients may need MM to proofread a document they wrote. We are flexible enough to step in and help at any point in a project, but we do let clients know if we have misgivings about what they have done to that point.

Let's take a brief look at the Analysis, Design, Development, Implementation, and Evaluation Phases and how MM works to be flexible within each.

Phase One: Analysis

An approach for development of any sort should include up-front planning and user analysis to ensure that your budget delivers results at every phase of your project. By conducting a thorough analysis at the beginning of the process, we ensure our ability to meet our client's budget and schedule. Analysis helps us to develop the right strategy, choose the right tools, and create the right deliverable for our clients. Clients sometimes ask us to step in and help after analysis. If they have done a good job of examining what they need and how they need to deliver it, stepping in is not a problem. If they have not, we often can guide them to do so by asking the right questions during the Design Phase. Success is unlikely without proper analysis. If you don't include an Analysis Phase in your projects, you can go over budget and off schedule quickly, and we let clients know this.

Phase Two: Design

Many projects begin with high hopes, but fail to live up to the expectations of the audience or the development team. In most cases, this is because the team runs out of time and must choose between deadlines and quality. By kicking off the project correctly, MM can eliminate the two most common reasons projects run out of time: rework and oversight.

During a kickoff meeting, we align our understanding and expectations before we begin designing the deliverable and creating a detailed project plan. Ideally, all project stakeholders should participate in the kickoff meeting, as our experience shows that project costs can increase by as much as 40 percent if the appropriate decision-makers are not involved during this initial phase.

However, this ideal-world scenario rarely happens. Often, our clients cannot pick a time when all their key decision makers are available, and they typically want to control costs by having a minimum number of attendees. Once we've explained to the client why it is helpful to have all the key team members present at the kickoff, we are flexible and willing to accommodate our clients' changing and often last-minute needs.

The Design Phase is also the time to set the stage for development by

creating a project plan and style sheet to guide development, and letting a client review a prototype that show the client what the deliverable will look like. This up-front review ensures that development stays on the right track. If a client does not have time to review these pieces or does not want to pay for them, we apply what we know from the analysis stage and create a style sheet, project plan, and prototype to follow internally so we stay on track. We emphasize to our clients the importance of signing off on design elements so that we can develop without a lot of costly stops and re-starts.

Phase Three: Development

After completing the Analysis and Design Phases, our team is ready to begin development. We develop iteratively, with an average of three review cycles that include data collection, development, review, and revision. After the third cycle, we deliver a final product for client acceptance before moving to the Implementation phase. The steps that occur within each development cycle vary significantly, depending on the medium, project complexity, and desired level of client involvement.

Throughout the Development phase, we keep our clients informed through status reports or team meetings. We know that regular communication and collaboration help eliminate project surprises that could lead to cost or schedule overruns.

Sometimes clients ask us to step in and develop without involving us in their Analysis or Design Phases. Again, if they have done a thorough job to that point, this is not a problem. If they have not, we may still ask the up-front questions they have not considered—and point out the problems not answering these questions could cause them. Sometimes clients ask us to go ahead even without thorough analysis or design. In those cases, we write carefully and edit thoroughly to do the best job possible.

At other times, clients may ask us to take them through the Analysis and Design Phases and then decide to complete the development on their own. If we have done our job correctly, we have given them a good map to follow.

Phase Four: Implementation

In phase four, we work with our clients to implement the solution at their site. Implementation tasks can be simple (emailing a document or uploading an application to a client FTP site) or complex (conducting pilot tests, designing an internal training marketing plan). We often work with clients who already have sophisticated production processes, meaning that MM plays only a supporting role by providing hardcopy or electronic masters. Sometimes, however, we are called upon to manage all implementation activities. We are very flexible with the implementation and evaluation phases and often get the deliverable to the client and that is the end of our involvement. Nonetheless, we are happy to help if asked.

Phase Five: Evaluation

McKinnon-Mulherin recognizes the value of evaluation—particularly for training projects. In general, organizations that evaluate their training outperform those that don't. At the outset of a project, we help our client determine the benchmarks necessary for conducting meaningful training evaluation. When the client's budget and timeline allow, we create the necessary instruments for conducting Kirkpatrick's four levels of training evaluation. Clients usually conduct their own evaluation using the tests and surveys we provide. Thorough evaluation takes place periodically over several months.

Summary:

The MM development process exists to support best practices and to secure our goal of delivering the right content in the right medium to meet our client's business needs. Although we believe our process produces the best results, we also recognize that our top priority is to collaborate with clients to meet their objectives within their budget and timeframe.

Setpoint is the leader in lean automation equipment from concept to functioning completion. Following the Toyota Production System, Setpoint has successfully created custom solutions for a broad variety of industries for over 18 years.