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By combining the best of AGILE development and the best of ADDIE discipline, we are able to move quickly to achieve training that meets the needs of the organization and the student. The following guidelines clarify how we manage projects and develop effective training that ensures understanding. Important considerations include maximizing the amount of time “not required” for that understanding by students, while developing with a structure that anticipates change.

The following checklist is used to gather the right information, the right people, and clear goals for your training programs. We hope it is helpful in your planning.

## Instructional Design Guidelines (AGILE-ADDIE)

### The Analysis Phase

1. Identify Contributors & Gather Relevant Information
  - A. Project Management
    - 1) Available marketing content, resources & requirements
    - 2) Sales & Marketing goals for project & how results should be measured
  - B. Subject Matter Content & Subject Matter Experts
    - 1) Existing Resources (and how each should be improved upon)
      1. Documents
      2. Searchable knowledgebase
      3. Media components
  - C. Working Environment
    - 1) Development tools for courseware
    - 2) Product lab & access details
    - 3) Company data storage & protocols
  - D. Training Management
    - 1) Learning management system and tools
    - 2) Existing content-development templates
    - 3) Courseware design and development standards & protocols (voice, fonts, styles, CSS, backgrounds, logos and other artwork, sizes, interactions, quizzes)

- 4) Dependencies & compliance (Section 508 & SCORM)
  - 5) ADDIE progress reporting and milestones
  - 6) AGILE reviews
2. Analyze Learners
    - A. Define Audience(s) and Clarify Prerequisite Knowledge
    - B. Develop Performance Objectives
  3. Overview Basic Project Plan
    - A. Development Timeframe
    - B. Alpha Project Guidelines & Audience Profile
    - C. Beta Project Guidelines & Audience Profile
    - D. FCS Requirements & Launch Plan
  4. Basic Plan Approval
    - A. AGILE Review & Tuning
    - B. ADDIE Review

### **The Design Phase**

1. Define Instructional Strategy & Delivery Method(s)
  - A. Address requirements for additional media components to be developed or incorporated
  - B. Address requirements for accompanying written documents (QuickStart)
  - C. Address requirements for accompanying trainer & technical support instruction
  - D. AGILE Review & Tune
2. Storyboard Project in Word or PowerPoint (including interactions)
  - A. AGILE Review & Tune
3. Storyboard external media components to be utilized (software demos, audio narration, music, video, external content presentations, etc.)
4. Storyboard Quizzes, Testing, Certifications and Course Evaluations
  - A. AGILE Review & Tune
5. Design Review
  - A. ADDIE Review & Tune

### **The Development Phase**

1. Develop the Template (i.e., Captivate Template)
  - A. AGILE Review & Tune
2. Develop the Content (using the Template)
  - A. AGILE Review & Tune
3. Develop or Integrate External Media Components (as required)

- A. AGILE Review & Tune
- 4. Develop Written Content – or QuickStart PDF (as appropriate)
  - A. AGILE Review & Tune
- 5. Develop Quizzes, Testing, Certifications and Course Evaluations
  - A. AGILE Review & Tune
- 6. Develop Trainer or Support Guidelines (as appropriate)
  - A. AGILE Review & Tune
- 7. Pilot the Course (Alpha Test)
  - A. ADDIE Review & Tune

## The Implementation Phase

1. Upload Course to LMS
2. Create Delivery Packages (Mobile, CD or DVD)
3. Pilot the Course (Alpha Test)
4. ADDIE Review & Tune

## The Evaluation Phase

1. Evaluate Results & Feedback
2. Measure Improvement
3. Revise Training (as needed)
4. ADDIE Review & Tune

## Product Maintenance and Upgrades

While it is not truly a part of the initial instructional design, planning for how maintenance and upgrades will be handled for the life of the product (both in terms of schedules and process) can save a great deal of effort and expense when considered from the beginning of the project.

AGILE Reviews are typically an invitation to view progress online. Comments or suggestions are encouraged within a brief timeframe (but always welcome). AGILE Reviews include a specific set of open questions requiring answers to, from the *“Contributor Community.”*

ADDIE Reviews are scheduled, formal reviews for approval. Responsible SMEs or other key players are encouraged to review the information presented, in detail.