

## LMS e-Learning Implementation Podcast Transcript #13 *Interview with Guy Wallace*

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**Mary Kay Lofurno:** Welcome to the next episode of the [SyberWorks eLearning Podcast series](#). My name is Mary Kay Lofurno and I'm the Marketing Director here at [SyberWorks](#), and your host today.

SyberWorks specializes in [customer e-Learning solutions](#), [Learning Management Systems](#) and [custom e-Learning development](#) for companies, governments and non-profit institutions.

Today we are starting a new two-part miniseries on Lean-ISD. The miniseries will consist of two interviews with [Guy Wallace](#), a certified performance technologist and President of EPPIC, Inc., an Instructional Design and Performance Improvement consulting firm located in North Carolina.

Today we will define Lean-ISD and look at the curriculum architecture design which supports it. In [part two of our series](#) we will compare Lean-ISD to the [ADDI model of instructional design](#). So stay tuned for some great information to help with your e-Learning program rollouts.

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**Mary Kay:** And now we will begin our interview with Guy Wallace, President of EPPIC, Inc., an Instructional Design and Performance Improvement consulting firm.

Good afternoon, Guy. It's great to have you here with us today.

**Guy Wallace:** It's great to be here.

**Mary Kay:** Guy, why don't you tell us a little bit about yourself before we get started?

**Guy:** OK. I've been an instructional planner, analyst, designer and developer since 1979. And I've worked as an external consultant since leaving the organization at Motorola that later became Motorola University.

Since that time, I and my consulting firms — I've had two — have served over 80 clients, and I myself have served over 40 Fortune 500 firms plus several non-U.S. firms and some U.S. government agencies including NASA and the U.S. Navy.

**Mary Kay:** Well, thanks. That sounds great. Today our topic is about lean-ISD, and I'm pretty excited about it and I know that you're an expert in this area. I'm ready to get started, how about you?

**Guy:** Yes. Sounds good to me.

**Mary Kay:** OK. All right. Tell us, Guy, what is Lean-ISD?

**Guy:** Well, first let's start with the ISD, which is an acronym for [Instructional Systems Design](#) or development, depending on your reference. And that typically refers to a sound, research-proven set of methods for developing instruction.

"Lean-ISD" is my book that describes my methods for ISD, which includes three levels of instructional systems design plus common methods, tools and techniques for both planning and management of those kinds of projects as well as for the analysis for each of those three levels of ISD.

The three levels of ISD are, at the top, curriculum architecture design; in the middle, modular curriculum development; and at the lower level, instructional activity development. Which kind of equates to systems engineering at the top, project engineering and development in the middle, and component engineering and development at the lower level.

And all three are intended to focus squarely on improving [performance competence](#) first and then determining what, if any, blend there might be in the deployment strategies, or whether rapid design and development methods are appropriate or not.

**Mary Kay:** OK, that sounds good. Guy, what do you mean when you say “performance competence?”

**Guy:** Well, performance competence is the ability to perform tasks to produce outputs to the stakeholder requirements. What’s key is understanding, via the analysis efforts, what those tasks of the traditional task analysis are intended to produce. And what do the customers and the other stakeholders require of the output itself and/or the process tasks?

A task analysis without an understanding of the output — the product of those tasks — is too partial an understanding of the performance context to lead to worthy learning objectives and worthy instruction.

And typically, just as understanding one performance context out of many for target audiences with complex jobs will not lead to the right instructional systems response, it too will be partial, which is why we have a lean methodology for analysis of performance and the enablers for our curriculum architecture design level of ISD.

**Mary Kay:** OK. So I guess my next question is what is curriculum architecture design?

**Guy:** Well, a curriculum architecture design is a comprehensive design for formal instruction and information based on an analysis of the performance requirements for whatever the scope of the effort includes, which could be a single job or a job family, a set of cross-functional processes, etcetera.

A curriculum architecture design is what some might think that they would get from a training needs analysis, but most often they don’t.

**Mary Kay:** So how does a company or an organization benefit from using this approach? It’s certainly a different approach.

**Guy:** Well, the curriculum architecture design is going to focus all instruction and information squarely at the [performance competence](#) requirements, but it will also validate or invalidate any and all of the existing training and development that’s being used for those target audiences of any blend.

It looks at the potential re-use of existing [training](#) and then it produces a modular design of gap or missing content so it can be prioritized for development and acquisition efforts by the ISD customers and any other stakeholders that are involved.

The comprehensive design will clearly have more of a performance orientation than a topic orientation.

**Mary Kay:** OK. So give me an idea, what do the outputs of a curriculum architecture design look like and what are the circumstances in an organization where one might use them?

**Guy:** OK. Well, there are several outputs. The first thing I typically show a client during a gate review meeting after the design effort is what we call a “training and development path.” It’s a learning continuum in kind of a marketing

poster format. I usually do a 3' x 4' foot poster in color that clearly lays out all of the [training and development](#) events in whatever blend that they are already in or are intended to be after the priority development and acquisition efforts.

Next we have training and development definition sheets for all of the existing training and development that is to be re-used. And we also produce training and development specifications and module specifications that articulate the modular design for all of the gap training and development at two levels. (One is) the event level, which is an administration level of the product. That's the level at which you would plan learning, order learning or complete and record learning accomplishments.

The module level spec is intended simply to help the customer or stakeholder better understand the content of the design really for their efforts at prioritizing the gaps later on.

And an organization would need a CAD effort when it knows it really needs to address all of the critical performance-driven instruction and information that's required of critical performers and critical business processes, and due to the high risk and high reward potential of their particular performance content.

**Mary Kay:** So how long does it take to design a curriculum architecture?

**Guy:** Well, the four phases of the process can be completed in couple of weeks if all the right resources are brought to bear for data generation, documentation and review prior to the data being used in the next downstream phase.

The key is ensuring the analysis data is complete, accurate and appropriate prior to using it in the design of this comprehensive curriculum, and that existing content is assessed rigorously prior to its inclusion or exclusion from the eventual curriculum architecture design.

Typically, however, it takes a couple of months to do one of these projects because of scheduling the people resources.

**Mary Kay:** Sure. I understand how that works. Guy, you know, this all sounds great, but how do you know it works and what are some of the key success factors to track in such an effort?

**Guy:** Well, I know it works because it's worked for me personally on 74 curriculum architecture design projects since my first in 1982. And my business partners and associates and even clients that I've trained in these methods have hundreds of additional successful acid tests, if you will, for management jobs and individual contributor jobs across many, many industries.

**Mary Kay:** OK. Well, I'm not going to let you go that easy. I'm going to hold your feet to the fire on this. Have you ever had a curriculum architecture fail? And if so, how come?

**Guy:** Well, yes, I've had several out of those 74 that I would have considered that failed. Not during the curriculum architecture design process itself, but they failed ultimately. They failed in their post CAD implementation efforts, which is to say that during the development and acquisition or the priority gaps of the curriculum architecture design, the team put to that task failed to maintain the modular design and perhaps the goodwill of the customers and stakeholders that was earned during their active participation in the four-phase CAD efforts.

The reason for those failures generally is typically a lack of an appropriate project steering team to own the effort and their hand-picking of the politically acceptable master performers and subject matter experts for the analysis efforts, the design efforts and the implementation planning efforts.

The truth is, the amount of data that a CAD effort produces is just too overwhelming for most busy executives at the end of the four phases. The CAD project plan itself from phase one is detailed enough for most busy executives, but

then when we get into the CAD analysis report and all the data there that we want to have approved and sanctioned before we go into the design phase, it's chock full of issues that the training and development learning and/or knowledge management efforts will never solve and are deserving of management's attention prior to or in parallel with the post-CAD development and acquisition efforts.

The CAD design document presents the [training development](#) or learning paths as we described earlier, and details the gap content as modular events and specifies what will be generally contained topic-wise, activity-wise with estimated lengths and how it will be deployed, etcetera.

And then there's a final implementation plan that is the guide to the prioritized post-CAD efforts for development and acquisition using any appropriate ISD methodologies and operating tools, etcetera.

**Mary Kay:** Well, Guy, I think we've made a pretty good start here. And I know you're very busy, so we're going to wrap it up here for today. Thanks so much for joining us here.

**Guy:** You're welcome. Talk with you soon.

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