

INSTRUCTIONAL DESIGN AND DELIVERY TOOLKIT
FOR SUBJECT MATTER EXPERTS

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CHAPTER 1 INTRODUCTION

In today's corporate environment, training departments not only depend on subject matter experts to provide technical information, but may also need these experts to deliver part or all of the training. Even though these experts are advanced technically and thoroughly understand the training content, it can be very difficult for these experts to explain the training content to an average adult learner.

My interest in helping subject matter experts succeed in the corporate classroom was sparked through an assignment by a previous employer. Our training department was new, yet expected to launch a full training program with few resources and little technical knowledge regarding our products. Therefore, we quickly realized our internal subject matter experts would play a key role in designing and delivering our training program. Like many subject matter experts, they had instructed others in the past regarding our products (because the training department did not exist); however, their idea of training and the training department's idea of training were different.

This project will provide a toolkit for subject matter experts containing practical tips that can get them started on the instructional design and delivery journey. The toolkit will include topics such as adult learner characteristics, training design fundamentals and facilitation tips.

CHAPTER 2 LITERATURE REVIEW

To determine the need and purpose for the toolkit, my literature research began with three questions:

1. Why are subject matter experts currently utilized in corporate training?
2. How can the instructional design team and the subject matter experts partner together to create a dynamic training experience for learners?
3. What types of training information would benefit subject matter experts the most?

To establish whether or not to include literature within this project, I assessed the literature based on the following criteria:

1. Article's value
2. Author's qualifications
3. Article's objectivity (Is the article free of biases?)
4. Article's copyright date (Is the literature recent?)

Regarding the copyright date, in some circumstances, older literature is included if the literature contains valuable, pertinent information. The primary resources used to locate literature included textbooks from previous instructional design and technology classes and journal articles found through the online databases at Emporia State University. Three online articles from Learning Circuits, a part of American Society for Training and Development, are also included.

Utilizing Subject Matter Experts in Corporate Training

Subject matter experts are often utilized to train employees rather than depending upon the training department because many organizations need to lower costs and expedite the flow of information to their personnel (Hofmann, 2002). The traditional role of subject matter experts, to simply supply and validate technical content, is changing. The subject matter experts find

themselves in the trainer role more often. Additional reasons why subject matter experts are given these roles include increasing amounts of critical training content and shorter training development timelines (Hofmann, 2002).

Through a synchronous class experience involving subject matter experts as the facilitators, Hofmann (2002) noted several ways the training could have been improved according to traditional training design standards. However, the training participants provided very favorable evaluations following the training, primarily due to the fact they had access to expert knowledge. The valuable access to the ‘ask the expert’ format outweighed the training design aspects that could have been improved.

Another perspective for using internal subject matter experts was voiced by Malis (as cited in Kiser, 1999). Malis explained how learning the technical information was not difficult; the challenge was communicating to the learners how business processes that had been utilized for several years were changing and how those changes related to the current training. Rather than using external trainers, his company decided to use internal resources since they would have key internal knowledge regarding business practices. A corporate university director, Smith (as cited in Kiser, 1999) believes that it is easier to teach an experienced subject matter expert who has extensive technical knowledge and good communication skills how to train than to teach a professional trainer the needed technical expertise.

In general, before a subject matter expert starts a training design or steps into a corporate classroom, a key training concept must be understood: training must teach students how to do something in order to solve a problem, not simply provide students with information about something. Determining how the training content will be utilized in a real business scenario must always be analyzed. Training can then address the circumstances and help to solve any issues

(Dolezalek, 2006). After the need is determined, the subject matter expert can work closely with the instructional design team to set objectives and move forward with the training design.

Partnering with the Training Department's Instructional Design Team

As subject matter experts begin their work with the instructional design team, establishing strong communication is very important. The instructional design team should provide detailed explanations of responsibilities and realistic time requirements, including a clear project scope (Bernier, Buchanan, & VanKampen, 2002). No matter the training length, technical training can involve many hours to create. The subject matter expert's availability in the beginning design stages is vital. During these stages, the objectives will be outlined based on the subject matter expert's technical knowledge (Mattoon, 2005). Therefore, the subject matter expert's participation is crucial to developing a solid training foundation for the overall training program.

A subject matter expert's availability is important, yet limited due to other full-time professional responsibilities. Meetings held to design training should take these factors into consideration. Mattoon (2005) recommends conducting short, concentrated meetings with durations of two to three hours, separated by one or two work days. Not only are these shorter meetings more convenient for the subject matter experts, but they also are less taxing on the subject matter experts.

McKeown (as cited in Simpson, 2003) provides a unique perspective. As subject matter experts are utilized, it is important for the organization and the instructional design team to realize the subject matter experts "are defined by the knowledge they have that links to their perceived usefulness to the organization" (McKeown, as cited in Simpson, 2003, p. 46). This means it may be difficult for these subject matter experts to attempt to communicate their

expertise when their expertise is what makes them important to the organization. The organizational culture must foster open communication where information is shared freely. Understanding this perspective could foster more openness between the subject matter expert and the design team.

Subject matter experts play key roles in developing training. As the instructional design develops, training instructors can provide essential support through mentoring subject matter experts (Kiser, 1999). The following guidelines provided by Piskurich, Beckschi, and Hall (2000) may aid the instructional design team as they work with subject matter experts. First, emphasize to the expert that the focus should shift from conveying only the curriculum, to determining how the information will affect the learner's abilities and proficiencies that eventually affect overall job performance. Second, ask the subject matter expert to observe a professional trainer during a training session. Third, videotape training sessions and provide feedback to the subject matter experts. Finally, emphasize the need for practice and feedback during class (refrain from lectures only).

Understanding Training Basics

While the subject matter expert can provide technical expertise, the training instructors can provide critical insights regarding adult learners, training design, and class facilitation. In the following paragraphs, key training information reviewed through my literature research is combined. This information serves as a foundation for the subject matter expert toolkit.

Adult Learner Characteristics. Adults are a unique target audience. Malcolm Knowles, the father of adult learning, provides an understanding of how to help adults learn in the classroom through his theory of andragogy (Lee, 1998). The andragogical theory emphasizes the need for a learner centered approach for adults rather than trying to utilize the pedagogical

theory, or teacher centered approach, commonly used for children (Imel, 1989). Knowles provided the following beliefs regarding adult learners through his andragogical theory (Lee, 1998):

1. Adults need opportunities for self-direction.
2. Adults can be very resourceful due to their vast amount of experiences. Adults also relate new learning back to their previous experiences.
3. Adults are prepared and willing to learn new things that they must be able to do to accomplish a certain role or responsibility.
4. Adults want to learn new things in order to utilize their new knowledge in real world scenarios. Their approach to learning is problem-centered.
5. Adults are motivated to learn by intrinsic rewards or by internal factors.

In general, adults take the newly acquired information and link it to what they already know to solve a problem. To effectively reach this target audience, their current subject matter knowledge is very important to evaluate before training design begins (Zemke & Zemke, 1995). Once the training starts, an excellent way to establish common ground among students and connect the new information to existing knowledge is to ask a series of questions that require students to share their experiences (Piskurich et al., 2000). Additional techniques to consider when planning the training design include storytelling, to ensure the students can relate to a real world scenario, presenting one concept at a time, to help the students organize the information in their minds, and summarizing, to promote retention (Zemke & Zemke, 1995).

Learning Strategies. Metacognition, commonly used by adults, involves self-assessment and self-correction. Through metacognition, a learning strategy is applied, progress is gauged (normally by answering questions), the extent of instructional applicability is determined, and a

corrective measure (such as re-reading) is implemented if deemed necessary. During training, adults attempt to clarify whether or not they truly understand the material. Adults also must determine if they will be able to directly apply the new information. Therefore, the inclusions of review questions, practice sessions or hands on activities throughout the instructional experience are important. For self-correction, answers should also be included. Additional design tips include providing clear course objectives and job aids for review purposes (Dobrovolny, 2003).

Dobrovolny (2003) also outlines additional learning strategies adults utilize including: reflection, prior experiences, conversations and authentic experiences. Through reflection, adults formulate how new pieces of information fit together as a whole and envision how they will apply the new knowledge to actual experiences or problems. Therefore, the training design should incorporate as many examples as possible.

Prior experience can affect the adult learner in different ways, depending on the individual scenario. For example, the learner may be perplexed, if the new material conflicts with prior experiences. If the new material coincides with prior experiences, the learner may feel more confident with the subject matter. Finally, if the learner does not have any prior knowledge, the learner may feel lost. Therefore, in the training design stages, the learner analysis is a key factor in creating relevant examples specific to the learners' experiences (Dobrovolny, 2003).

Conversations also serve as an important component of adult training. Conversations allow the students to inquire about material, confer with others about how the material resolved past issues, and explain to co-workers what they learned. One of the best ways to learn material is to teach it to someone else. From a training design perspective, it is important to encourage adult learners to share the new information with others, and to plan discussion opportunities in class (Dobrovolny, 2003).

Motivation. As subject matter experts explore ways to motivate adult learners in the training, they must recognize the resourcefulness of their students. If students believe they have a need for training, the trainer should capitalize on the students' willingness to share experiences and actively participate in class. According to Zemke and Zemke (2003), there is a "window of opportunity" that will allow the trainer to make the most of how receptive the students are to learning new training content.

The amount of time between training and real world application of the training matter also affects learner motivation. Learners must be able to apply the new content immediately. Not only will the immediate application increase motivation to learn the material, but it will also strengthen the newly acquired skills. If learners do not have opportunities to apply the new information, the new skill will quickly vanish (Zemke & Zemke, 2003).

Thoms (2001) suggests additional considerations to increase adult learner motivation. While her considerations are not attributed to other resources or authors, her ideas are consistent with other findings. Her recommendations include: dividing the training content into small, manageable pieces that are easier to understand, ensuring learners are aware of how the pieces fit together in a relevant way pertaining to their job requirements, providing ample documentation and hands on activities, encouraging group work, and promoting exploration of the subject matter.

Training Design Fundamentals. Subject matter experts may understand that training design is necessary, but they may not understand what the term, instructional design, means. According to Smith and Ragan (1999) "the term instructional design refers to the systematic and reflective process of translating principles of learning and instruction into plans for instructional materials, activities, information resources, and evaluation" (p. 2). Research shows there are

many instructional design models; however, for subject matter experts that are new to instructional design, the ADDIE model will be followed. In the paragraphs that follow, the ADDIE model is briefly explained according to textbook authors, Piskurich, Beckschi, and Hall. After reviewing the literature, I decided to develop a template as part of my project.

Piskurich et al. (2000), outline the main components of the ADDIE model as analyze, design, develop, implement and evaluate. During the analysis phase, or the data collection phase, the designer establishes whether or not a training need exists. All aspects of a specific job or situation must be carefully explored. If the designer concludes there is a training need, the next step in the analysis phase is to decide what should be taught and what the learner should be able to do at the end of training (Piskurich et al., 2000).

During the design phase, the designer determines the gap between the target audience's current skills and the desired skills necessary to meet the training goals, resulting in the determination of the training requirements. Once the training requirements are sketched, the designer creates measurable, observable objectives. Test items, based on the training criteria, are also created (Piskurich et al., 2000).

When the training designer reaches the development phase, all of the information learned thus far in the design process is combined and translated into actual learning activities. These learning activities should resemble real world scenarios. Learners will need to understand how to directly apply the information they have learned (Piskurich et al., 2000).

The training launch occurs within the implementation phase. The implementation plan contains details such as: administrative and logistical requirements, demographics of target audience, and training activities and curriculum. Also, the trainers who will facilitate the training must be scheduled (Piskurich et al., 2000).

During the final or evaluation phase, both formative and summative evaluations should occur. A formative evaluation provides immediate feedback regarding instructional quality from trainers and learners to the instructional design team so curriculum revisions can be made. A summative evaluation involves the application of Kirkpatrick's four levels of evaluation and the direct application of the curriculum to real world scenarios (Piskurich et al., 2000).

Facilitation Basics. Justice and Jamieson (1999) explain in their text that in order to provide effective facilitation, the instructor needs to understand the following key concepts: learners will have varying learning styles and varying learning styles require diverse facilitation methods. A facilitator must be familiar with three learning styles: auditory, visual, and kinesthetic. Therefore, learners should be able to see and hear the training content along with having the opportunity to do something with it. Justice and Jamieson (1999) also provide the following suggestions when facilitating adult learning: review the class agenda and ask for input, discuss ways the training content fits into the larger organizational structure as well as the small tasks that must be completed, provide choices as much as possible, provide periodic breaks so the learners are not engaged in one learning activity too long, encourage group discussion and sharing, and create ways of reiterating or reviewing key concepts.

PowerPoint. PowerPoint is a powerful training tool if used effectively. However, PowerPoint must be used wisely. Browning (2004, p.98) cautions the usage of PowerPoint by stating:

PowerPoint doesn't communicate – you do. No amount of PowerPoint will help you if you don't know what you are saying. In fact the more slides you have, the less likely you are to say anything that anyone remembers. With PowerPoint less is always more. Similarly, Tufte (2003) also cautions against the misuse of PowerPoint. Tufte explains

that often the focus of PowerPoint presentations is the format of the presentation, not the actual content. The presentation then becomes only a sales tool. Trainers must be very careful not to let the content of the presentation suffer, simply to try to impress the audience with PowerPoint formats and animations. Tufte (2003) summarizes his thoughts best by explaining:

Presentations largely stand or fall on the quality, relevance, and integrity of the content. If your numbers are boring, then you've got the wrong numbers. If your words or images are not on point, making them dance in color won't make them relevant. Audience boredom is usually a content failure, not a decoration failure.

Browning (2004) suggests the following tips when utilizing PowerPoint: use pictures rather than text when you can, refrain from importing documents or spreadsheets directly onto a slide (rather have the learners read a hard copy or use email), limit the number of bulleted items, and use descriptive slide titles, Buss (2006) also offers the following PowerPoint suggestions: do not use too much text on a slide, limit the time spent on each slide to thirty to sixty seconds (for training purposes, discussions and activities could add to this timeframe), and refrain from reading directly from the slide.

Summary

Through this literature review, the following main themes developed:

1. Subject matter experts' roles in the corporate classroom are changing, with subject matter experts becoming a vital part of the instructional design team.
2. In order to form a partnership, subject matter experts and the instructional design team must develop strong communication. Responsibilities and expectations must also be clearly defined.
3. To be an effective trainer, subject matter experts should have strong communication

skills, a desire to help others, and an openness to learn basic training strategies and concepts.

4. Training must be directly related to real world scenarios, so learners can return to their workplace and apply their new knowledge.

With more and more subject matter experts, with little or no training experience, entering the corporate classroom, the need for basic instructional design and delivery tips will be needed. The subject matter experts need a simple tool to utilize as they develop training for the first time. The goal of the toolkit is to provide a starting point for these experts as they venture towards training excellence.

CHAPTER 3 INSTRUCTIONAL DESIGN MODEL

To create this project, I chose the ADDIE instructional design model. Therefore, the following design components were included: analyze, design, develop, implement and evaluate. In the following paragraphs, each component is carefully described.

Analysis

First, as I analyzed the need for an instructional design toolkit, I spent time constructing a front-end analysis (Smith & Ragan, 1999). I wanted to create a toolkit that a subject matter expert could directly use in a corporate setting. The three components of the front-end analysis consisted of examining the learning context, the learners, and the task (Smith & Ragan, 1999).

To examine the learning context, I relied on past personal experiences, my literature review and a subject matter expert survey. I knew from working with subject matter experts in the past that they often had little or no instruction on how to train. From my literature review, I found evidence that in many cases subject matter experts are relied upon for training for a variety of circumstances. Finally, through a subject matter expert survey, I was able to determine there was a need for a basic instructional design resource. This survey, along with the survey results, is located in Appendix A.

As I studied the learning environment and learners for this project, several criteria were considered. First, I anticipated the subject matter experts use technology (such as the Internet) for daily corporate uses. Therefore, the subject matter experts would be able to navigate my project easily if I utilized user friendly navigation. Since they have limited time, the project would need to be direct and applicable to real world scenarios.

Since the organizations in which this project could be used will vary, the existing curriculum that may have been previously developed will need to be taken into consideration

(Smith & Ragan, 1999). However, for the majority of the subject matter experts utilizing this project, it will be their first exposure to instructional design. As long as the organization has Internet access along with Microsoft Word and PowerPoint, the subject matter expert should not encounter any problems. Finally, to maximize the project usefulness, it will be applicable to subject matter experts working in larger corporations with full training departments as well as to those subject matter experts who are employed in small organizations that may or may not employ full-time trainers.

For the task analysis, I created the project's learning goals. I wanted to have a clear understanding of what the subject matter experts needed to comprehend after they worked through the toolkit. The following learning goals were created:

1. When given a project requiring partnership with the training department, the learner will be able to identify at least three key issues that should be addressed before the training design is started.
2. When given adult learner characteristics and learning strategies, the learner will be able to outline training activities or methods appropriate for the target audience.
3. When given a specific training topic, the learner will be able to outline a training design based on the ADDIE instructional design model and facilitate the training.

Design

Within the design phase of my project, I determined the training requirements for the toolkit. I examined the level of training expertise of the average subject matter expert and compared the result with the level of knowledge the expert would need to start a training design for a specific class. The outcome of this examination transformed into training requirements and the following main topics: using subject matter experts in the corporate training, working with

trainers, understanding adult learners, identifying basic training design, and understanding facilitation tips. Next, the following learning objectives were created:

1. Given a brief explanation regarding why subject matter experts are utilized in the classroom, learners will be able to describe in 300 words or less at least 3 advantages of using subject matter experts.
2. Given a brief explanation of the importance of communication throughout the training effort, learners will be able to explain in 100 words or less why communication is crucial within their organization.
3. Given a list of questions that subject matter experts should ask the training department, learners will be able to identify at least 4 questions and explain how the questions relate to their specific training requirements.
4. Given an overview of Malcolm Knowles' andragogical theory, learners will be able to summarize the theory in 500 words or less with at least 80% accuracy.
5. Given an explanation of motivating adult learners, learners will be able to provide at least 2 examples of how they will directly apply this information in their own classroom.
6. Given examples of a job aid, metaphor, and a mnemonic, learners will create at least one of these to use in one of their classes.
7. Given the ADDIE design model, learners will be able to develop a training design that could be used in their classroom with at least 80% accuracy.
8. Given an overview of Kirkpatrick's four levels of evaluation, learners will be able to explain in 500 words or less how the levels of evaluation pertain to their organization and how they will specifically use each level.

9. Given a videotape of one of their classes, learners will be able to apply the information learned within the facilitation section to identify at least 3 improvements that could be made to their facilitation techniques.
10. Given a sample PowerPoint presentation, learners will identify 3 strong aspects of the presentation and 3 areas for improvement.

For test items, quizzes were created for each toolkit section. A pre and post test, along with a final exam, was also included. Through essay questions, the final exam analyzed in depth the learner's understanding compared to the toolkit's learning objectives.

Develop

For the development phase of the toolkit, I created the training content along with examples and quizzes. Within the design example sections, a sample PowerPoint class was designed as a real world example to follow. Additional resources, examples and checklists were provided throughout the toolkit.

To develop the toolkit and its contents, several tools were utilized. These tools included: Macromedia's Dreamweaver to develop web pages, Microsoft's Word and PowerPoint to create examples and quizzes, EclipseCrossword.com to generate a quiz, Macromedia's Flash to create a quiz, DiscoverySchool.com to construct the pre and post test and final exam, and QuickTopic to build an online discussion board. Cooltext.com enabled me to create the toolkit's logo text. Images within the toolkit were courtesy of Microsoft Clipart Gallery, Classroom Clipart, and Hassle Free Clip Art.

Implement

I am unable to implement the toolkit in a real world scenario. However, as a trial, a technical trainer consented to work through the toolkit. The feedback is provided in Appendix B.

For a real world implementation, I would utilize the following plan. First, I would meet with the subject matter experts' managers to describe the design process using the toolkit. Second, I would ensure all subject matter experts who were planning to participate had access to the toolkit. Third, I would determine when the subject matter experts would be in the office at the same time and meet with them as a group to provide a general description of the toolkit and to address any questions or concerns. Fourth, I would provide the toolkit to the experts and give a timeline of one month to work through it. Throughout the month, I would contact each expert at least once to determine if any additional help was needed. Finally, after the month elapsed, I would meet again with the experts and review the material and answer questions. The need for further training or resources in specific areas of interest would be determined.

Evaluate

For the evaluation of the toolkit, I asked a training manager to provide feedback. The evaluation form, along with unedited comments, is provided in Appendix C. The same evaluation form was also included within the toolkit so the subject matter experts could also offer feedback. For evaluation of the learner's knowledge after the toolkit was completed, I incorporated a pre and post test so scores could be compared. The final exam would also provide valuable details regarding the learner's knowledge after completing the toolkit.

CHAPTER 4 RESULTS

As expected, the toolkit will remain a work in progress as more feedback is provided by users in a variety of scenarios. While the feedback provided thus far is limited, the feedback indicated the information would benefit a subject matter expert who is expected to train.

(Additional feedback was sought; therefore, an additional evaluation is included in Appendix D.)

Examining the pre and post tests, the average pretest score was a 70%. Interestingly, the four individuals who completed the pretests all missed the questions related to the ADDIE instructional design model. Since the ADDIE model comprises a large portion of the toolkit, the learners were exposed to information they did not appear to understand before they started the toolkit. (Not everyone completed a post test. I revised the last page of the toolkit so users are reminded of the final activities that need to be completed.)

Another result of creating this toolkit centers on the utilization of subject matter experts in the classroom. After conducting my research and creating the toolkit, I realized how important it is to use the subject matter expert in the appropriate training role. Rather than using the subject matter expert in the instructor role, other alternatives include using the subject matter expert as training support in the classroom, present to answer any real world application questions the instructor may not be able to answer, or using the subject matter expert as part of an 'ask the expert' panel at the end of training. In any case, each individual subject matter expert, along with the specific training needs, must be analyzed in order to make the right training decision.

CHAPTER 5 CONCLUSION

The largest obstacle of this project was obtaining the resources needed. Implementing the toolkit in a real world scenario was impossible due to limited resources. However, my previous co-workers provided feedback so my toolkit was completed. If I was creating the toolkit for a specific corporate scenario, I would customize the toolkit. Documents and examples would directly tie to the needs of the specific organization. In the future, I would like to survey more subject matter experts with varying training backgrounds and years of technical expertise. The more input from those individuals in the field, the more beneficial the information within the toolkit will be.

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APPENDIX A

Instructional Design Tips and Tricks Toolkit
 Subject Matter Expert Survey
 (Please note: Survey results are unedited.)

Your input is very valuable. Results from this survey will provide direction and practical insights for a toolkit of instructional design tips and tricks for subject matter experts. Information gathered in this survey may be directly incorporated into the toolkit.

1. On average, how many hours per month do you spend teaching in the classroom? 10-20, 3, 2

2. How long is your average preparation time for your classes? (For every hour of class time, how many hours do you prepare?)
 Less than 1 hour, 1 hour (1 response), 2 hours (1 response), 3 hours (1 response)

3. What is your first step in designing training?
 Needs assessment; I either get the info from the person/group requesting training or do it myself via an interview with the requestor.

Defining the goal of the training class.

Determine who audience is and how they relate to the topic.

4. What tool could the training department have provided you or told you when you were starting to train that would have made your training role easier?

Organized practice in steps (section one is done so let's run through it with some new people; section two is now done so let's practice with some other people, etc) as opposed to here's the big "group pilot"

A more effective explanation of the training mission and role for the company. Defining the goal as 'world class' is too vague and generic.

No tool as they provided a class on developing a training module. My problems were that they were not clear to all, so that a consistent message was sent, and they tried to direct the message rather than let me develop it.

5. If you were mentoring a new subject matter expert who needed to deliver training, what advice would you give to him/her?

Practice, practice, practice the material in front of people so you know what you're going to say and how it flows with a group; Learn as much about the material as you can; Don't be afraid to say, "I don't know"

Attend several training classes conducted by well known and respected facilitators with a focus on observing techniques and tricks that they use.

Determine audience. Contact members of the audience (potential or real) and ask what they would like to see out of it. Develop based on the input and hopefully some type of "template" that allows the module to be consistent with others that may be taught.

6. What aspect of training is the most difficult for you? (organization/design, facilitation, visual aids/presentation creation, student motivation) Please explain.

For me it's actually learning the new material. Once I get past that, the rest falls into place.

Organization/design - trying to take knowledge that I have and delivering it in a way that created

interest and real learning for a class is difficult for me.

Student motivation - as a non-professional teacher, it is not my natural characteristic to be motivating to a captive audience. I tend to present rather than teach and get them involved.

7. What skills do you think are most critical to be a successful trainer?

Not necessarily in order) Technical knowledge, classroom management, writing ability, organization, flexibility (as in, "Oh, you wanted to talk about this rather than that" at the last minute.)

Enthusiasm and a real working knowledge of the subject matter. A desire to train.

Knowledge of the subject matter. Capabilities to get the students to learn, ask questions, get involved, etc.

8. How do you evaluate if the students understand the training content?

Pre and post testing to see where they started and where they finished

Testing

Not sleeping. Ask questions. Answer questions. Request feedback.

9. How do you motivate adult students to learn?

Students are responsible for their own motivation. Teachers and students are partners in this relationship, and I don't buy the idea that it's all up to me to motivate a class and make sure they learn something. That said, I certainly think I need to be interesting. Multiple hours of monotone lecture would put anyone to sleep. The material certainly has to be relevant too, and it should tie directly to the class description/needs analysis so people are taught the material they came for.

Activity with the concepts - opportunity to interact with the concepts in labs or exercises.

Allowing them to share their experiences in the field and add value to the course with their input.

Try to give examples that they may be familiar with so that it seems like an actual application. This gets them to think about similar services, problems, etc. that would make more sense.

10. Describe your greatest challenge as a subject matter expert who conducts traditional classroom training.

Making the move from "Technical Expert" to "Training Specialist". The skill needed to manage a classroom are clearly different than being a Technical Expert on something.

Maintaining classroom energy and interest.

Lack of experience, skill to motivate and get interaction between the students and teacher.

Additional Comments

You certainly learn each time you teach something. I know I'm better at the HWR class now than I was two years ago if for no other reason than I've heard most of the questions by now and I have answers ready for them.

I feel that an effective training class is the tip of the sales sword. In our business, giving a quality, fun experience in which students actually learn is the benchmark for training success.

We have the opportunity to leave the student with more than knowledge - a memorable experience that they will relate to their peers.

APPENDIX B

Evaluation Form
Implementation Phase

(The following unedited comments are courtesy of a technical trainer)

Please rate the following aspects of the instructional design and delivery toolkit for subject matter experts.

(1 is the lowest score, 5 is the highest)

Toolkit Design

The toolkit was simple to navigate and the information was easy to find. Rating: 5

Comments: Very easy to get around - did no have to struggle

The toolkit design incorporated appropriate graphics and colors for text and backgrounds. Rating: 4

Comments: Good contrasts, easy to see, although some of the clip art looks "canned"

The toolkit was user friendly and well organized. Rating: 5

Comments: One of the best I've ever worked with**Toolkit Content**

The toolkit contained practical information that could be applied to a real world scenario. Rating: 5

Comments: This nails it

The toolkit was easy to understand. Rating: 5

The toolkit contained a variety of information. Rating: 5

Comments: I liked how you can drill down deeper and deeper into topics

The toolkit provided valuable additional resources. Rating: 5

How would you rate the toolkit overall? (Not answered)

Additional Comments:

I am VERY impressed with the professionalism of the product.

APPENDIX C

Evaluation Form
Evaluation Phase

(The following unedited comments are courtesy of a training manager)

Please rate the following aspects of the instructional design and delivery toolkit for subject matter experts.

(1 is the lowest score, 5 is the highest)

Toolkit Design

The toolkit was simple to navigate and the information was easy to find. Rating: 5

The toolkit design incorporated appropriate graphics and colors for text and backgrounds. Rating: 5

Comments: The layout was very easy to read and navigate

The toolkit was user friendly and well organized. Rating: 4

Comments: Consider incorporating some examples within the text rather than requiring additional downloads every time. This would save the learner time, make the design more user friendly, and ensure they won't skip viewing valuable examples. I realize balancing the amount of text on your pages is important too, so you'll have to make the examples within your text short. You could always include a short example in the text, and encourage learners to view additional examples in download form.

Toolkit Content

The toolkit contained practical information that could be applied to a real world scenario. Rating: 5

Comments: This toolkit includes extremely valuable information for the SME new to training

The toolkit was easy to understand. Rating: 5

The toolkit contained a variety of information. Rating: 5

Comments: The toolkit covers many elements of training design, delivery, and evaluation in a simple, understandable format

The toolkit provided valuable additional resources. Rating: 5

Comments: I loved the links to other training websites. These additional resources are an excellent way for SME's to get more depth of understanding in each of the areas introduced in the toolkit.

How would you rate the toolkit overall? Rating: 5

Additional Comments:

I am confident that many companies (with or without training departments) would find value from this toolkit!

APPENDIX D

Evaluation Form
For Results Chapter

(The following unedited comments are courtesy of a subject matter expert)

Please rate the following aspects of the instructional design and delivery toolkit for subject matter experts. (1 is the lowest score, 5 is the highest)

Toolkit Design

The toolkit was simple to navigate and the information was easy to find. Rating: 4

Comments: On one page, I was confused where I was - Training Design was the page title, but the menu bar was Design Basics - wasn't sure if I got back to the right place. All other seemed okay. Could always go back to the menu bar.

The toolkit design incorporated appropriate graphics and colors for text and backgrounds. Rating: 4

Comments: Seemed okay, but could increased line spacing (1.5x) make it easier to read?

The toolkit was user friendly and well organized. Rating: 4

Comments: I like it and would use it to develop a new training module. How long will it be around? At the end, you should put a reminder to do the post test or another hyperlink.

Toolkit Content

The toolkit contained practical information that could be applied to a real world scenario. Rating: 5

Comments: Very useable as a refresher for me. Could you prepare a "check list" of the steps to ensure a good training module and put that as a tool in the toolkit?

The toolkit was easy to understand. Rating: 4

Comments: _____

The toolkit contained a variety of information. Rating: 5

Comments: _____

The toolkit provided valuable additional resources. Rating: 5

Comments: As before - will it be available in the future?

How would you rate the toolkit overall? Rating: 5

Additional Comments:

- Menu bar buttons - larger or bold white font on blue background
 - On Home page, you do not define SME that is used on the menu bar.
 - Single click on menu bar buttons instead of double click
-