Situation-Based Learning Design Process

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This job aid utilizes wisdom from Will's and Roy Pollock's "Building Measurement…" job aid.

Steps	Rationale	Self-Rating	Notes and Answers
Recommended Chronology	Why Important?	Circle If Done	Write Short Notes or Answers
A. Overarching Goals and Needs Analysis – Specified at Strategic Level in Broad Strokes			
A1. Learning and/or business leaders identify training opportunity.	L&D can add real value. We should be proactive; not just reactive.	Done Done Well	
A2. Underlying business needs are clearly articulated.	Training is a business investment; it must serve business needs.	Done Done Well	
A3. What is the overarching goal of the learning? What will learners do differently and better on-the-job?	Focuses both design and measurement on performance.	Done Done Well	
A4. In what type of situations will they have to do these things?	Focuses both design and measurement on where the learning will be situated.	Done Done Well	
A5. Is training the right solution?	Not all performance issues can be solved by training.	Done Done Well	
A6. Besides training, what else is required to produce the desired behavior?	Training is rarely the whole solution; clarify responsibilities of non-training stakeholders.	Done Done Well	
A7. What are the relevant metrics? Match to business and learning imperatives.	Be specific to guide both learning and measurement design.	Done Done Well	
A8. Get sign-off from all appropriate stakeholders on all items listed above.	Getting alignment *in advance* is critical to ensuring support and delivering what is needed.	Done Done Well	
B. Detailed Objectives – Specified at Detailed Tactical Level			
B1. Performance Objectives – What specific things will learners do differently and better on-the-job?	Now is the time to get specific about the performance that is expected of the learners.	Done Done Well	
B2. Situation Objectives – What specific situations will they have to do those things?	Because learning must be properly contextualized, knowing the situations is key.	Done Done Well	
B3. Evaluation Objectives – What specific things will be measured?	Measurement must be built in, not bolted on. Make metrics concrete early to enable fixes.	Done Done Well	
B4. Instructional Objectives – What are the key learning points (principles, ideas, contingencies, etc.) that you want your learners to know?	Note how the instructional objectives are subordinate to performance-, situation-, and evaluation- objectives.	Done Done Well	
B5. Get sign-off from all stakeholders on all items listed above.	Getting alignment *in advance* is critical to ensuring support and delivering what is needed.	Done Done Well	

C. Detailed Design and Development – Worked at Detailed Tactical Level			
C1. Sketch initial: **a.** training design, **b.** after-training support, **c.** on-the-job learning support, **d.** measurement instruments; get input; then improve.	Quick-sketching is beneficial; provides good overall sense; enables initial feedback.	Done Done Well	
C2. Does the training design enable learners to focus their attention on the most critical information?	Ensure that learners attend to the most important information. Utilize variety, avoid overloading working memory, provide feedback when appropriate, and support focus on critical information.	Done Done Well	
C3. Does the training design enable deep understanding?	Ensure that the learning messages connect with what learners already know, are shared in a sequence that builds appropriate mental models, and relate logically to learners' job goals and values.	Done Done Well	
C4. Does the training design support long-term remembering?	Consider providing: learning aligned to job context; realistic retrieval practice; spaced repetition opportunities; after-training reminders.	Done Done Well	
C5. Create rapid prototypes of all four critical components (a, b, c, d); get input; then improve.	Rapid prototyping is beneficial; provides better feedback; enables quick corrections.	Done Done Well	
C6. Pilot-test all four critical components (a, b, c, d); review data; then improve.	Pilot-testing is beneficial; provides best feedback; enables smart corrections.	Done Done Well	
C7. Deploy all four critical components (a, b, c, d).	To maximize results requires great learning *and* workplace supports, so the first three (a, b, c) must all be deployed. Measurement deployment is critical to enable improvement and to prove benefits.	Done Done Well	
C8. Review data and feedback from all four critical components (a, b, c, d).	Ensure integrity and fairness in data analysis.	Done Done Well	
C9. Develop report. Share results. Collect stakeholder feedback.	Share the truth, good & bad. Sell learning's excellence.	Done Done Well	
C10. Capture lessons learned. Debrief with appropriate stakeholders.	Lessons learned must be captured in a usable format and conveyed clearly.	Done Done Well	
C11. Make improvements. Plan future improvements.	Good measurement provides data to prove *and to improve.*	Done Done Well	

Use this job aid to understand, benchmark, and improve your current practices. Consider posting this at your desk. Or, integrate with your design process.