Qualitative Data Analysis

Assignment #2

Key Challenges and Obstacles

Facing a Global Instructional Design Team

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MDDE 701 Advanced Research Methods

Key Challenges and Obstacles Facing a Global Instructional Design Team

Introduction

Qualitative research involves the collection and analysis of extensive narrative data in order to gain insights into the "why" of a phenomenon as it occurs in a natural setting. The purpose of this document is to collect and analyze data using the narrative and phenomenological approaches to investigate and rank the key challenges and obstacles that face a global instructional design team. It then analyzes the validity of and compares the two approaches.

Research Problem

Large corporations are increasingly relying on global teams to design, develop and implement innovative learning solutions that positively impact performance.

The focus of this report is to identify the key challenges and obstacles faced by instructional designers working as a part of a geographically-dispersed team for a global corporation.

For this assignment, I have interviewed two experienced instructional designers, one from each of the United States and the Philippines who both work for the same corporation that ascribes to the ADDIE model within its Training and Curriculum team. Most often, the role of the often approximately 40-member instructional design team is associated with the Design and Development phases of the ADDIE process.

Like most instructional designers, they work in a highly collaborative manner and work closely with learning specialists and consultants, clients, subject matter experts, trainers, graphic designers, editors, and content engineers.

Both of the participants in this study are currently dedicated to the same vertical, in which they create contact center training for a large telecommunication company. They develop instructor-led, virtual classroom, and e-learning training delivered throughout the world. They are currently involved in the design and development of training at both the program and course level. Both participants in this study are also often responsible for supporting and training less experienced team members.

The main purpose of this research is to identify the key challenges in the instructional design process in rank order as perceived by the instructional designers themselves. It also considers the impact that geographic location and working conditions have on both the challenges faced by instructional designers and how they address them, and seeks to identify skills, traits and behaviours common to this diverse group of instructional designers.

This qualitative study is divided in to two sections. In the first section, I use the narrative approach introduce the reader one of the study participants. This section helps to situate the instructional designer and allows the reader to gain insight in to the challenges in the instructional design process as perceived by an individual. It focuses on the impact background, previous experience, personality, geographic location and working conditions have on the challenges faced by instructional designers.

The second section applies the ideas and concepts of phenomenology to seek out common themes among the research participants, and devise a comprehensive list of challenges with the instructional design process as perceived by the instructional designers. This list could form the basis of a larger phenomenological or quantitative research study.

Because this is not a formal research project, it as not been through a Research Ethics Review Board review.

Approach #1: Narrative
Purpose Statement

The purpose of this narrative study is to identify the main obstacles and challenges as faced by an instructional designer working on a globally-dispersed team, and to rank their importance from the most to the least important.

Central Research Question

What do you see as the most significant challenges you face in the instructional design process?

Sub Research Questions
Sub research questions can be divided into issue-oriented and procedure-oriented questions (Creswell, 2007). For the purposes of the narrative study, I identified the following sub research questions:

Issue Questions

1. How is your work impacted by these challenges and obstacles?
2. What are some examples of these challenges and obstacles?
3. Which of these challenges do you see as the most important? Why?
4. Which of these challenges do you see as the least important? Why?
5. What suggestions do you have to address these challenges?

Procedural Questions

1. What is the rank order of these challenges from the most to the least important?
2. What are the key "learning points" in the story of this individual?

3. What are some social, cultural and organizational theories that relate to this individual's experiences?

Data Collection
Participants

Calvin was selected to participate in the narrative study. He was selected to participate in the narrative study because he was "accessible, willing to provide information, and distinctive for their accomplishments and ordinariness." (Creswell, p.119). His name has been changed in order to provide him anonymity.

Calvin is in his twenties. He works in a contact center in Manila in the Philippines. He works the night shift and is co-located with several instructional designers on the project team as well as a large contingent of the project operations and quality teams. He worked as a trainer before transitioning to instructional design. Having been with the team for fourteen months, he is the most senior Filipino member of the instructional design team.

Purposeful Sampling
The participant has been selected to participate in narrative studies because he represents a quite typical or ordinary cases; there are many other new instructional designers working under similar conditions and facing the same challenges and obstacles for this and other global companies; he highlights what is normal.

I also selected him based on the criterion that he is a high-performer and well-respected as a role-model within the instructional design team and larger training and curriculum organization.

Access and Rapport

Calvin was also selected using convenience sampling. I have been his manager for the past six months. Throughout that time I have developed a good rapport him and we have discussed many of the topics covered in this research in casual conversations and team meetings.

For the purposes of this research, I have explained the purpose and scope of the project. I have also explained that participation in this project is completely voluntary and in no way associated with the work or performance appraisal. I also told him that he is able to refuse to answer any question or to pull out of the project at any time. I have also agreed to grant the subject anonymity and remove references to any information that may be deemed confidential or proprietary by our employer. I reviewed the purpose of the study and received consent at the beginning of the interviews (See Appendix A).

Forms of Data and Recording Procedures

Although I have never had the opportunity to observe the participant in person, I have "observed" the outputs of his work over the past six-month period and have had many casual conversations with him concerning the challenges/obstacles he faces.

Based on these observations and conversations, I was able to "refine and focus" formal interview questions (Jorgensen, 1989, p.82). I conducted a formal telephone interview during the last week of November, 2011. The interview outline is provided in Appendix B.

During the formal interview, I obtained official consent from the participant to use his experiences as the basis for the narrative study. I also received permission to review his performance appraisal, emails and project outputs in order to develop information-rich stories that reflect his experiences. The formal telephone interview was recorded, and extensive descriptive and reflective typed notes were added during and after the interview using a tool called AudioNote that allows notes to be added to an audio recording.

After the formal interview, I conducted less formal follow-ups for clarification by telephone, email and chat. These methods of communication also represent the primary methods of communication for this globally-dispersed instructional design team and thus represent a comfortable environment in which to conduct the interviews, making it a good data collection strategy.

Resolving Field Issues

According to Creswell, beginning researchers are often overwhelmed by the amount of time needed to collect qualitative data and the richness of the data encountered "beginners start with limited data collection" consisting of one or two interviews (p. 138). As a result, I have focused on competing a short narrative, which focuses on the current challenges faced by this instructional designer.

The completion of the narrative also posed certain ethical issues as the participant is also my direct report. I resolved these issues, by clearly identifying the purpose ad scope of the research, and also by ensuring that I was careful to ensure the questions asked did not overstep our professional relationship. (For example, I did not ask any questions concerning the age, marital status, family, etc.). Any references to relationships outside of work were freely volunteered by the participants.

Storing Data

Interview data was stored in its original form using the program AudioNote with the notes included in the audio file. For the purposes of this project, the interview was not transcribed. The interview file was saved on both a hard drive and removable disk. Other sources of information including emails, projects outputs and performance appraisals

were viewed and stored in the primary locations. To ensure personal and company security, I did not make copies of these files.

Data Analysis and Representation

Data Managing, Reading, and Memoing

After recording the interviews, I reviewed the interview file and placed Calvin's experiences in chronological order (Creswell, 2007).

Describing

By creating outlines of the key events in the career of the instructional designer, revealed the decisions and events that caused him to choose a career in instructional design, and a series of challenges that he has faced in that role.

Through this process, "The narrative segments and categories within the interview-story are isolated" and larger patterns and meaning begin to emerge (Creswell, 2007, p.158). The interview, resulted in the identification of key challenges that Calvin has faced and continues to face in his role as an instructional designer. Although I know he is a successful instructional designer who has overcome many challenges, he tended to focus on the challenges and obstacles that he has been unable to solve.

As a result, the narrative, has more of "life in the trenches" feeling that that of a "victorious retrospect."

Classifying

Because Calvin focused largely on the challenges he has been unable to solve, classifying these challenges using the three-dimensional space approach (Clandinin and Connelly, 2000) seemed the most appropriate. As a result, I looked at each of the challenges he identified in terms of three elements: interaction, continuity, and situation as seen in Table 1.

Table 1: Key Challenges Identified by Calvin

Challenge	Interaction	Situation	Continuity
Implementation problems	Social	He has had recent discussions with people in operations who have indicated that elearning courses are not being released to and completed to agents promptly.	Present

Challenge	Interaction	Situation	Continuity
No way to evaluate quality of work	Social	Calvin has been working for the past year to implement a level 1 reaction survey on the end of every elearning to evaluate their impact. This initiative has been mired in challenges and obstacles.	Past and present
Desire to see work have a real impact does not always happen	Personal	Calvin has a strong desire to see his work make a real difference. He is not currently feeling that his work is having a significant impact on performance.	Present
Need to shorten the turnaround time for course development	Social	Calvin identified a need to improve the speed at which courses are developed and implemented a pilot with a new tool. The pilot went well and then the project hi some snags	Past
Course development not being driven by or addressing real performance problems	Social	Because Calvin is co-located with operations, he is keenly aware of the performance problems they face. He currently feels that we are not addressing these performance challenges in an effective way based on our current instructional design model	Present

Interpreting

After taking the time classify the challenges as identified by the instructional designer, I took some time to interpret the larger meaning of his story.

Calvin identified implementation issues as his number one challenge and evaluation of the output of instructional designers as number two. These challenges was driven by both a personal and social need "to make a difference". He indicated that "it feels good to have your work appreciated". He also hover expressed frustrations about the issues outside of his control that limited the impact of his work, particularly related to the topics of implementation and evaluation. In this way, his is a story of youth and its idealism, energy and eagerness.

He is also extremely driven to advance professionally. He tended to closely link success as an instructional designer to its impact of performance. He recognizes that there are significant opportunities for advancement for him *if* he can have a positive impact on performance. The opportunities for smart, educated Filipinos continues to grow. His story is also the story of an emerging middle class in the developing world that recognize and are extremely driven to capitalize on these opportunities.

Representing and Visualizing

Calvin is well known on the instructional design team for a series of innovative elearning he created when he first joined the team. Thus, it seemed fitting to depict him in his Mii form as part of his narrative. His narrative also focuses on his individual story and presenting him as a whole person, including both what make him unique and completely ordinary (see Appendix C).

Approach #2: Phenomenology

Purpose Statement

According to Stewart and Mickunas (1990), phenomenology is a "reasoned inquiry which discovers the inherent essences of appearances" (p. 3).

The purpose of this phenomenological study is to investigate the "essence" of the instructional design experience to identify a rank order of the challenges face by three instructional designers working as part of a geographically dispersed team for a global company.

The phenomenological study will investigate highlight the common experiences and challenges faced by instructional designers. It also seeks to dig below the surface to identify how differences in location and working conditions can affect the perception and strategies employed to address these issues. Ultimately, the results gathered here may be used to set the foundation for a larger phenomenological or quantitative study of the larger instructional design team and, ultimately, to inform intra- and inter-team process changes.

Central Research Question

What is the essence of the challenges and obstacles faced in the globally dispersed instructional design process as perceived by the instructional designers themselves?

Sub Research Questions
For the purposes of the phenomenological study, the following sub research questions have been identified.

Issue Questions
1. What are the key roles of an instructional designer?
2. What items outside the control of instructional designers present challenges?
3. What strategies do instructional designers employ to overcome these challenges?
4. How successful are these strategies?

Procedural Questions
1. How similar is the rank order of the challenges and obstacles faced by instructional designers from different locations?
2. What common themes emerge from their experiences?
3. How do differences in background, culture and working environment affect how these challenge are experienced and addressed?

Data Collection

Participants and Purposeful Sampling

Phenomenological studies can range in the involvement from 1 to over 300 participants. In a full research study exploring the challenges facing instructional designers, I would interview a significant cross-section of the company's instructional design team. In the interest of simplifying this research however, I have decided to limit the study to two participants. The participants for the phenomenological study include Calvin, who also participated in the narrative study, and Dan.

Dan is man in his fifties who works out a home office outside of Cincinnati, Ohio, USA. Trained as a technical engineer, he transitioned into a training role in the 1980s. He was involved in the development of the first computer-mediated learning development for his former company in the 1990s. He has been working an instructional designer since that time and have been in his current role for approximately one year.

In this case Dan and Calvin have been selected for their ability to "inform an understanding of the research problem and central phenomenon" (Creswell, 2007, p. 125). For this study, the represent a stratified purposeful sample.

Both participants meet the criterion that they have an excellent understanding of the instructional design process and an interest in process improvement. They however, work in very different work environments and geographic locations and bring different experiences to their roles as instructional designers.

Forms of Data and Recording Procedures

Collecting information for a phenomenological study primarily involves conducting in-depth interviews. I developed an interview protocol (Appendix B) and conducted a series of interviews in the last week of November, 2011.

During these formal interviews, I obtained official consent from the participants to use their experiences as the basis for these narrative studies. I also received permission to review their performance appraisals, emails and project outputs in order to develop information-rich stories that reflect their respective experiences. The formal telephone interviews were recorded using a tool called AudioNote that allows notes to be added to an audio recording. Reflective notes were added to the recording after the interviews.

After the formal interview, I conducted less formal follow-ups for clarification by telephone, email and chat. These methods of communication also represent the primary methods of communication for this globally-dispersed instructional design team and thus also represent the essence of working as part of a global team.

Resolving Field Issues

As with the narrative study, an ethical issue in this study resulted from the fact that both participants directly report to me. This issues was addressed by clearly identifying the purpose ad scope of the research, and also by ensuring that I was careful to ensure the questions asked did not overstep our professional relationship. (For example, I did not ask any questions concerning the age, marital status, family, etc.). Any references to relationships outside of work were freely volunteered by the participants.

Another ethical issue to consider is recognizing my own current frustration with issues related to implementation, inefficient allocation of resources and poor communication between the instructional design team and other members of the training and curriculum team has the potential to prevent me from fully acknowledging the responses of the participants. Phenomenologists use a practice of bracketing to "the process of setting aside, suspending, or holding in abeyance presuppositions surrounding a specific phenomenon" (Gearing, 2004, p.1433). I will endeavor to employ this technique during this study to remove my own feelings on these issues and accurately reflect the opinions of the study participants.

Storing Data

Like in the narrative study, the phenomenological interview data was stored in its original form using the program AudioNote with the notes included in the audio file. For the purposes of this project, the interviews were not transcribed. The interview files were saved on both a hard drive and removable disk. Other sources of information including emails, projects outputs and performance appraisals were viewed and stored in the pri-

mary locations. In order to ensure personal and company security, I did not make copies of these files.

Data Analysis

Data Managing, Reading and Memoing

Having tried to set aside my personal experience with the challenges faced by instructional designers through the process of bracketing those experiences, I focused on reviewing the interview recordings, emails and recent self-performance appraisals. During this phase, I worked to identify "a list of significant statements" (Creswell, 2007, p. 159) located within these sources of data.

List of significant statements
IDs can identify process gaps because they look at issues from the perspective of the novice.
No mechanism for this information to be incorporated into process improvement.
High need to craft learning in a way that benefits learners.
Need to address existing tools.
Not a lot of "cool" in classroom development.
Process is always dictated by outside forces who often understand neither the process nor the business.
Require ability to think outside the box and play well within it.
Decisions made by learning specialists who are removed from both the business and the development process.
Have only bits of ID training, nothing formal.
Creativity required but often stifled
Only able to be as effective as time and money will allow.
So much ID work is going offshore.
Redoing "non-IDs" work is also expensive.
You often get what you pay for.
SMEs have their own agenda and often little interest in/time for education.

List of significant statements
Not viewed as performance partners, training development is an afterthought
Setting up an evaluation strategy is difficult.
Want to be more proactive in addressing performance gaps.
No standard way of evaluating quality of the courses developed.
Easy to spot opportunities, difficult to get permission to address them.
Need to figure out how the learning delivery system works to ensure it is working efficiently - development should stop until the issue us addressed.
Need to reduce the lag from courses going live to being completed by learners
Not enough reuse of existing courses.
Need to see learners go through the training to access its impact and identify ways to improve.
Too many courses being developed.
More rewarding if you see people appreciate it.
We are building courses too big for the infrastructure.

Describing and Classifying

I then used Mind Mapping software to group them in to "meaning units" or themes and refine a list of non-repetitive, non-overlapping list of statements that could be used to describe the phenomenon and identify the relationships between these statements and meaning units.

I originally thought that I might be able to group the issues raised according to the AD-DIE framework. Although issues related to each step in that process arose, they did not cleanly support the grouping of the significant statements.

Ultimately, I identified five major themes: Performance, Need, Solution, Impact, and Value. Within the theme of "solution," I identified six minor themes including Skills, Time, Tools, Project Types and Complexity, Training and Supervision, and Support. These sub-themes are the aspects that I expected would be the key areas of focus during the interviews. Though these topics did arise, however, they often arose as a part of a larger issue. Although I am not surprised that factors beyond the solution aspect of the process came up, I was surprised how heavily they dominated the conversation with both instructional designers.

This leads me to believe that part of the essence of the experience of a successful instructional designers is to take a holistic look at the content development process rather than to focus more specifically on the "content development process" which is normally thought of as the role of instructional designers in this role.

Interpreting

The next step was to write a "textural description" of "what" the participants in the study experienced that included verbatim examples for each theme. I then included a "structural description" in which I reflected on "how" the experience happened including the impact of the setting and context and ranked them according to the overall importance the study participants assigned to these items.

Theme	Textural description	Structural Description	Rank
Meeting the Need	"There is a high need to craft learning in a way that benefits learners."	Needs are constantly changing and there is a high turnover rate in contact centers. The success of the business depend on the ability to upskill people quickly.	4
Developing the Solution	IDs must be extremely flexible. They must be able to creatively solution "outside the box, but also play well within the box" when decisions have been pre-determined. This requires a wide variety of skills, abilities and behaviours be refined with only "bits of ID training, nothing formal." There is never enough time or money or the right tools to be truly effective.	Solution decisions are often being made before reaching the ID team so budgets, timeframes and tools are normally predetermined.	5

Theme	Textural description	Structural Description	Rank
Having an Impact	There are "too many courses not enough reuse. We need to figure out how the learning development system works and ensure it is working correctly. Development should stop until it is working correctly." There is no current standards to evaluate the quality of the courses being developed. It would be nice to know we are having an impact.	Instructional designers are primarily thought to be involved in the development of content; the more content being developed the more demand (and job security) for instructional designers. Currently success is measured by the volume and speed of course development	1
Ensuring Value	"Designing and developing excellent content is of no value if we fall down in implementation or it doesn't improve performance. It costs a lot of money to develop a course."	In a highly competitive industry, focus on value for money is always high across the business.	3
Improving Performance	It is easy to spot opportunities to improve performance. It is much more difficult to get permission to address them." Instructional designers have the desire and ability to become "performance partners."	The industry is performance-driven. Agents are scorecard-driven. The business is results-driven.	2

In combining the textural, structural descriptions and rank order some interesting interpretation emerge. For example, the instructional designers saw making an impact as the most important challenge they face. Though implementation and evaluation generally fall outside of their accepted role, they identify them as the most significant challenges they are currently facing. Moreover they shared concerns about there being too many courses, wanting to see greater reuse, and suggesting the complete cessation of development if implementation issues are not addressed. This is despite the fact their current team's business success is rated according to the volume and speed with which their content is developed; they do not seem to see these criteria as particularly valid.

In another example, although the instructional designers did identify a list of challenges related to the solution phase, these challenges were consistently ranked of lower importance than the other challenges. This may indicate that experienced instructional designers have learned how to successfully navigate and address these challenges. By conducting a similar study with less experienced instructional designers one could seek to identify whether there was an "evolution" of challenges associate with the instructional design process as perceived by instructional designers with them first learning to overcome the challenges associated with developing the solution and then considering the larger process overtime.

Representing and Visualizing

Finally, I write a composite of the phenomenon incorporating both the textural and structural description that described the "essence" of the experience of the instructional designer working as part of a global team (See Appendix D).

Comparison of Narrative and Phenomenological Approaches

Both approaches have both strengths and weaknesses from the perspective of validity. The narrative study does a better job of identifying how specific challenges in the instructional design process might be specifically related to Calvin's ethnography, previous experience, and current working environment.

Conversely, it does present the possibility that it may lead to incorrect generalizations. Although they work on the same team, Dan's work environment and reality is quite different from Calvin's. Using a narrative study that focuses on a single example, it is possible that incorrect generalizations might be made across instructional designers working as a part of the same global team. Thus, narratives limit the ability to generalize but are effective at highlighting the individual differences between cases.

The phenomenological approach was a more effective process for focusing on the similarities and commonalities of the experience of the two instructional designers. In developing a "common" experience however it could also be said that one is creating a false experience. Although the purpose is to create a composite of the experience in order to describe its true "essence," it is also unlikely that this true essence of the experience will fully reflect anyone's reality. Using this approach there is a danger in not clearly emphasizing the difference between a "composite" and "common" experience. It would however b expected that this limitation would be reduced as the number of participants in the study increased.

Representing and Visualizing

The final step is to write a composite description of the phenomenon combining the textural and structural descriptions (See Appendix F).

Conclusions

Qualitative research has both benefits and drawbacks for researchers. Among the benefits, both of the approaches allowed me to refocus my conceptions around the instructional design process and its key challenges; new themes emerged from both studies that I would have likely not considered using only quantitative research.

The research did call out some interesting themes in terms of challenges: Implementation, Evaluation; Having an Impact and Improving Performance. Clearly the instructional designers in this study perceive their role as much more than content developers.

Even more interestingly it points to a possible new way to conceive of the instructional design process outside of the existing ADDIE model, a performance-driven instructional design model.

The drawbacks, of course are related to small sample size and inability to draw any real conclusions from the experiences of two instructional designers. Clearly more research, both qualitative and quantitative is required.

References

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Appendix A: Research Participation Consent

Read and receive consent for the following before proceeding with the interview.
I am requesting your participation in an informal research study aimed at understanding the challenges faced by instructional designers working on a globally-dispersed team. This research will contribute to my learning qualitative research techniques in a Master of Distance Education course offered at Athabasca University.

Based on your experience as a member of the (Company name) instructional design team, I am requesting your permission to conduct and record a one-on-one interview as well as to review your professional emails, outputs, team blog entries and 2011 self-performance appraisal in order to learn from your experiences.
This project is completely separate from our working relationship and participation is completely voluntary.

The study will result in the development of a narrative that details chronologically the challenges you have faced in your role as an instructional designer, and a phenomeno-logical study seeking to identify the "essence" of the instructional design experience and the challenges faced in this role.

Please be aware that you are free to decide to not participate at any time and are free to ask any questions or refuse to answer questions at any time. You will be granted ano-nymity as a part of this project and all findings will gladly be shared.
This research project is a requirement for completion of the MDE 701 course and there-fore been reviewed by the official research review board. However, there are no known risks associated with this study, and the anticipated benefits include the opportunity to participate in qualitative research and provide input that may be useful in improving our internal team processes.

Do you give your consent to continue with the interview?

Appendix B: Narrative Research Interview Outline

Interviewee:
Date:
Time:
Location:

Introduction

After introductory pleasantries, commence by gaining consent to continue with the interview. After consent has been given, review the purpose statement and the central question for the research project.

Purpose Statement

The purpose of this narrative study is to identify the main obstacles and challenges as faced by instructional designers working on a globally dispersed team, and to rank their importance from the most to the least important.

Central Question

What do you see as the most significant challenges you face in the instructional design process?

Questions

1. How is your work impacted by these challenges and obstacles?

2. What are some examples of these challenges and obstacles?

3. Which of these challenges do you see as the most important? Why?

4. Which of these challenges do you see as the least important? Why?

5. What suggestions do you have to address these challenges?

Appendix C: It Comes Down to Really Making a Difference - Describing Activity of Narrative Study

I met with Calvin by phone on November 30, 2011. The conversation was not much different from our normal weekly calls, except for the fact that this time I was armed with a consent, audio recorder and formal interview questions.

I've known Calvin for about a year and have worked closely with him for the past six months and he has always impressed me with his bright ideas, pragmatic approach and creativity though we've never met in person.
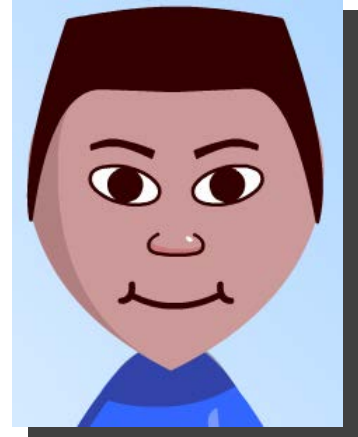
Even as a kid, Calvin had an interest in teaching and learning. He played being a teacher in a makeshift class with his younger sister. "It was fun for me, helping people learn. Sharing what I knew was fun. It was even more rewarding if I could see the people appreciated it."

It should not perhaps have come as a surprise when he found himself working as a trainer in a contact center some years later. (Contact centers are the largest private-sector employers in the Philippines.) In that role he often noticed gaps in the materials he was using to train; the materials had not been updated.

"I was a new trainer for (company name). I had a problem with a class grasping how to use (the billing system). They needed to have more familiarity with the screens and tools so I developed some basic materials." Calvin's class did much better due to the new materials and Clavin's boss was very appreciative. It was at that point that he really recognized "the ability to craft learning materials can benefit any trainer or learning experience."

Approximately two years later, in September 2010, Calvin joined the instructional design team. At the time, he was the only instructional designer based in the country. His was quickly recognized for his creative and bold use of graphics to clearly communicate with learners in elearning and then his ability to work closely with subject matter experts, learning specialists and clients across a variety of projects and mediums.

By February of 2011, Calvin was working primarily in the development of elearning as a part of his current project team and had identified two key challenges: (1) The need to be able to more quickly turn around elearning project, and (2)There is currently no standard way of evaluating the quality of our work. He quickly devised strategies to address each of these three issues and piloted some of the initiatives. After a successful pilot with the rapid development tool Articulate, Calvin could not advance use of the tool. The will and budget to support the use of the new tool was simply not available. Similarly "coming up with an evaluation strategy has been difficult."

It was however in implementing the pilot level 1 elearning reaction survey that more significant challenges began to emerge.   After the initial pilot, he found that there had been zero completions of the course. This information led him to ask more questions.

As he has continued to ask questions, he has found that "some of the key function seem to not be working. Agents are not able to take a course as soon as it goes live." At this point, it is unclear whether there is a technical issue with the system, if the courses are not being assigned properly, or if there are just too many courses to take. Calvin feels that this is the most important challenge we are currently facing. When asked what he would do to improve the instructional design process he said, "Ensure (the LMS) is being utilized correctly. Everything else stops until we figure out how it works. It is very frustrating, coming across colleagues in the pantry and hearing of these types of complaints. It comes down to having your work valued - to really making a difference."

Appendix D: Phenomenological Research Interview Protocol

Purpose Statement

The purpose of this phenomenological study is to investigate the "essence" of the instructional design experience and to attempt to order the challenges faced by instructional designers working as part of a geographically dispersed team for a global company from the most important to the least important.

The phenomenological study will investigate highlight the common experiences and challenges faced by instructional designers. It also seeks to dig below the surface to identify how differences in location and working conditions can affect the perception and strategies employed to address these issues. Ultimately, the results gathered here may be used to set the foundation for a larger phenomenological or quantitative study of the larger instructional design team and, ultimately, to inform intra- and inter-team process changes.

Introduction and Bracketing

As you know, I've been working hard over the past while to address many of the challenges that we face as instructional designers. From clarifying the instructional design process through the development of the ID Playbook, to trying to improve our communication with the LS team and increasing our interactions with SMEs and clients through the design and development process. I've also recently been highlighting issues related to project management, analysis, implementation and evaluation. You are probably also aware that I am a strong proponent of the value we provide not only regarding program design and content development, but also throughout the phases of analysis, implementation and evaluation and that I have recently been frustrated by the lack of progress that we have made in these areas. During the remainder of this interview, I'm going to try to set aside my thoughts and feelings on these subjects and record the challenges and obstacles you face from your perspective.

Central Question

What are the key components of the challenges and obstacles faced in the globally dispersed instructional design process as perceived by the instructional designers themselves?

Questions
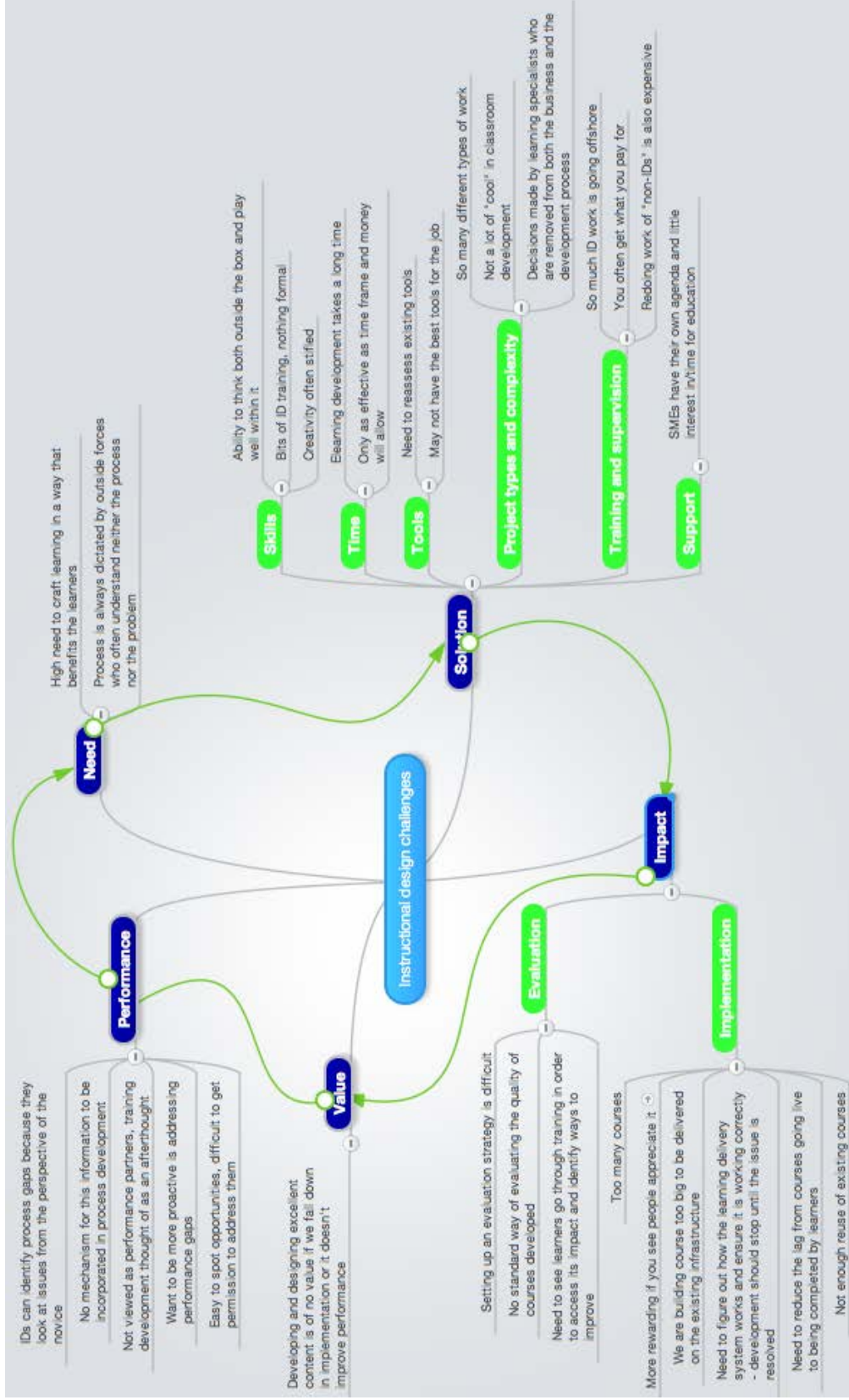1. What are the key roles of an instructional designer?

2. What are items outside the control of instructional designers that present challenges?

3. How would you order the challenges from the most to the least important? Why?

4. What strategies do instructional designers employ to overcome these challenges?

5. If you could do anything to improve the instructional design process, what would you do?

Instructional design challenges

Need
- High need to craft learning in a way that benefits the learners
- Process is always dictated by outside forces who often understand neither the process nor the problem

Solution

Skills
- Ability to think both outside the box and play well within it
- Bits of ID training, nothing formal
- Creativity often stifled

Time
- Elearning development takes a long time
- Only as effective as time frame and money will allow

Tools
- Need to reassess existing tools
- May not have the best tools for the job

Project types and complexity
- So many different types of work
- Not a lot of "cool" in classroom development
- Decisions made by learning specialists who are removed from both the business and the development process

Training and supervision
- So much ID work is going offshore
- You often get what you pay for

Support
- Redoing work of "non-IDs" is also expensive
- SMEs have their own agenda and little interest in time for education

Performance
- IDs can identify process gaps because they look at issues from the perspective of the novice
- No mechanism for this information to be incorporated in process development
- Not viewed as performance partners, training development thought of as an afterthought
- Want to be more proactive is addressing performance gaps
- Easy to spot opportunities, difficult to get permission to address them

Value
- Developing and designing excellent content is of no value if we fail down in implementation or it doesn't improve performance

Impact

Evaluation
- Setting up an evaluation strategy is difficult
- No standard way of evaluating the quality of courses developed
- Need to see learners go through training in order to access its impact and identify ways to improve

Implementation
- Too many courses
- More rewarding if you see people appreciate it
- We are building course too big to be delivered on the existing infrastructure
- Need to figure out how the learning delivery system works and ensure it is working correctly - development should stop until the issue is resolved
- Need to reduce the lag from courses going live to being competed by learners
- Not enough reuse of existing courses

Appendix F - Challenges of Instructional Design - Composite Description of the Phenomenon

Above all instructional designers want to have an impact. Although instructional designers are primarily thought to be involved in the development of content they also care a lot about how their work is being implemented and evaluated. They worry that there are "too many courses and not enough reuse." They want to know that learners are accessing their course when they will be most helpful and and appreciating them. "We need to figure out how the learning development system works and ensure it is working correctly. Development should stop until it is working correctly." Although the development of evaluation criteria for their work may lead to increased scrutiny and workloads, they seem are eager to seek out ways to identify quality. "It would be nice to know we are having an impact."

In many ways, having an impact is related to improving performance in the contact center industry which is heavily based on performance. Agents are rated on monthly scorecards. Reporting team scour the data, and pay for performance benefits and penalties are industry standards. Although their performance is not currently rate using a scorecard, instructional designers are eager to become engaged. "It is easy to spot opportunities to improve performance. It is much more difficult to get permission to address them." Instructional designers have the desire and ability to become "performance partners."

In a highly competitive industry, focus on value for money is always high across the business. Again, the instructional designers are aligned with the business needs in their desire to ensure value. They are keenly aware of their potential to positively impact changes as well as the obstacles that are currently getting in the way. "Designing and developing excellent content is of no value if we fall down in implementation or it doesn't improve performance. It costs a lot of money to develop a course."

Needs are constantly changing in the contact center industry. The needs of the business, their customers and and the agents are in constant flux. Moreover, there is a high turnover rate in contact centers; the success of the business depend on the ability to upskill people quickly. the instructional designers see it as their role and responsibility to meet that need. "There is a high need to craft learning in a way that benefits learners." They also recognize that they have the skills to meet that need.

Developing the solution is the primary function of the instructional design team, and they identified a large number of challenges they face in the process. They did not however see these as the most significant challenges. They seem to have developed a series of effective strategies to overcome these challenges. IDs must be extremely flexible. They must be able to creatively solution "outside the box, but also play well within the box" when decisions have been predetermined. This requires a wide variety of skills, abilities and behaviours be refined with only "bits of ID training, nothing formal" and there is there is never enough time or money or the right tools to be truly effective.

The instructional designers care about the results of the entire end to end process. They often face limitations and recognize that there are many components of the process that are outside of their control. Despite the challenges however, they seek to daily improve both the process and the quality of their solutions.