Instructional Design Part 1

David Gonzalez, Noah Hendricks, Clarissa Martinez, Laura Moreno, and Cedric Turner

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Professor Hattier

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**Analysis and Description of Organization & Stakeholders**

The organization itself, along with its’ stakeholders, consist of the foundation thatallows the instructional design process the ability to occur. H-E-B, an American private supermarket chain-based grocery company, is the selected organization our team chose to help refine their performance issues. The name H-E-B comes from the man Howard Edward Butt, where he founded this company on November 26, 1905 in Kerrville, Texas. Furthermore, Howard Butt’s son, Charles Butt, took over as H-E-B’s president, chairman, and CEO in 1971 where he has helped progress the business tremendously by increasing the amount of annual sales to 13 billion (Wikimedia Foundation). H-E-B’s headquarters is located in San Antonio, Texas and has more than 400 locations throughout Texas and Mexico (Petty). H-E-B’s overall purpose is to produce high satisfactory grocery like products and leave the customer with no complaints. H-E-B takes great pride in their wide range produce and aspire to give thorough business to all of their consumers. In return, H-E-B strives for multiple goals including greatly increased rates of revenue, expansion in more metropolitan, and most importantly prolific customer satisfaction.

H-E-B has a multitude of stakeholders as any large chain-based organization would, but there are four main ones that highlight H-E-Bs profound sustainability throughout the market. The first of which consists of the suppliers. The suppliers are an external and secondary stakeholder that help supply products on H-E-B’s shelves (Minning). Although H-E-B does have its own superb bakery in stores, they need third party suppliers to help their stores excel. The supplier’s purpose is to provide good products for H-E-B to sell and have the same goal in mind of delivering thorough customer satisfaction as well as safety. H-E-B’s suppliers learn which items are more desirable and maintain high demand business, especially through product sales.

The second main stakeholder H-E-B highlights includes the owners. H-E-B consists of multiple owners across the organization. They are all primary and internal stakeholders directly influencing H-E-B’s business decisions. Furthermore, their purpose is to supply the capital and equity which allows them the jurisdiction of saying how they want the business to operate (Minning). These owners are the huge decision makers as well as the company leaders. If a decision is ever made that could’ve been better, the owners dissect the business decision to learn from it and make the applicable changes necessary to maintain great business structure. The main goal for H-E-B owners is to make large amounts of profit for the company.

The third main stakeholder H-E-B consists of includes the employees. H-E-B has a magnitude of staff throughout a variety of departments within the organization. Each employee is an internal and primary stakeholder within the company, and each one holds a direct correlation to the company’s overall success. Employees are the backbone of the organization and their main purpose is to perform all of the tasks required for the organization to function properly especially upon customer interaction (Minning). An employee’s goal is to perform their job at a high level to greatly support business operations. To ensure that, H-E-B must undergo realistic and effective training to provide the proper learning environment for their employees to perform up to par. In return, H-E-B provides their employees with currency and potential benefits to reward them for their hard work. Further, if an employee is ever unsatisfied with something within the organization, H-E-B takes the action necessary to learn and find possible solutions.

The fourth and final main stakeholder H-E-B is compiled of includes their customers. The customer holds an external, yet primary and direct stakeholder within H-E-B’s organization. No business would be able to exist without customers, therefore it makes them of the utmost importance. Moreover, the customer’s purpose is to consume goods from the seller, which is H-E-B in this case (Minning). The goal of the customer for H-E-B is to support the supermarket-based grocery store by shopping for their products. Because the customer has elected to shop at H-E-B and support their business through currency transactions, they expect high quality products, value, and service ensured by H-E-B in return. Furthermore, if a customer is ever unsatisfied with their transaction, H-E-B dives into the problem through customer feedback to learn from the situation and attempt to make sure it doesn’t happen again.

Now that the supply chain aspects of H-E-B have been distinguished, the stakeholder of the learning solution may be identified. The H-E-B supermarket industry consists of many employees, yet only a few of the specific job titles have access to make vital decisions based on the learning solution. Although the CEO holds majority of the power within a company, many business decisions are made by those within the business. The Human Resources management team will make these crucial decisions in the best interest for H-E-B. They have the power, knowledge, and expertise to approve these essential learning solutions that the company may need at any point in time, and the wisdom to implement this knowledge onto the field.

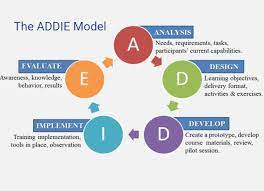
**Analysis and Description of the Performance Problem￼**The organization our team chose to work with was the retail business H-E-B. Our team selected this organization because we want to focus on the employees and see if the training, we want to focus on the employees and evaluate their training they receive helps them assess their daily job appropriately. This means that the training they are receiving are not helping them become more effective in their workplace. The problem, identified as a root cause, is the negative turnover rate of new employees because of their struggle to learn the training programs. This information was determined by the Human Resources management team and was thoroughly delivered to our team by HR leads. We identify that training is the issue because of how unrealistic the in-training scenarios are for the associates, especially when it comes to handling customer inquiries and problem solving.

The videos the organization provides to their employees do not seem accurate to real-life scenarios. Furthermore, they are just simply unrealistic because the scenarios they convey focus on how to do excellent customer service (smile, greet, engage) but they don’t explain how to problem-solve if a customer has any issue, some videos take too long to get to the point, and they don’t provide real world examples. They might seem too generic and not personalized for the work area. It adds extra time to the employees and affects their functionality with their job as well as the service they provide to the customers. The idea of the performance solution is to reduce the amount of time to complete training courses that are not realistic scenarios at the store. Moreover, reducing the amount of training time is to focus on a training manual that present real life scenarios. In the case videos are provided, they have to be short and consistent. Proper training will make employees better capable and ready for their jobs. Some employees watch videos regarding the type of position they are going to perform either that be a cashier or parking lot assistant. Moreover, if the videos are not well structured, the associate will not feel comfortable within the actual situation and feel emotional stress on the job. The need assessment is used to identify the performance problem and consider the employee’s needs in an effort to adjust these issues for better overall performance for the individual at hand (Andriotis, 2018).

Data support from retail employees that we ask suggests that videos and handbooks do not provide the necessary, realistic training that employees require. The team collects the data by asking leads/managers about the training the organization(H-E-B) provides. The team also includes the employee's opinion as well. They seem extremely boring and a waste of time. Some employees suggest a one-one training and shadowing program that way they have a real experience in the workspace before they begin on the job tasks. For example, the organization should incorporate clear scenarios so they can apply their knowledge and skills in a real-world context. Next, the training scenarios should facilitate the knowledge process, so their employees' information goes from theory to practice. Finally, the main idea is to motivate the employees to achieve the desired outcomes and provide them a with a better understanding through training methods that will actually be helpful for real-world applications (Pappas, 2017).

**Description and evaluation of the training need**

The instructional design method chosen for H-E-B was the ADDIE model. The ADDIE model has proven to be flexible, effective, good to build up on, straight forward, and low-cost. It is an excellent model in any systematic approach for instructional development, especially in large chain-based organizations. Therefore, our team deemed the ADDIE model to be the most superlative choice for H-E-B’s instructional design process regarding the issue at hand.



Analysis

Using this model, H-E-B has determined a performance problem, where the onboarding partners are experiencing a difficulty in their initial training. At this stage a needs assessment is conducted. A needs assessment is used to determine the analysis step of ADDIE. In H-E-B performance reviews, customer feedback, and observation are parts of the initial process for any change. These methods were chosen in order to provide customer satisfaction, improve employee morale, and establish strong data collection. In addition, H-E-B keeps a close eye on analytics as an important part of the performance process. This has kept H-E-B as the standard for hospitality and grocery retail for the state of Texas.

Design

In this step, the consultant and H-E-B will work together to design and plan for the prospective change. The objectives include improving overall as well as individual performance of new partners including an improvement for the onboarding training and talent management. At this stage a goal analysis is conducted identifying the desired outcomes of the intervention (Morrison et.al). In H-E-B the design process for any change, begins from its roots and core values that have withstood the test of time. Service, heart, drive, and community are the pillars of all design processes for H-E-B. The H-E-B instructional design team will be making informed decisions based on the data collection and needs assessment that visualizes a gap in performance. Specifically, new hires that do not perform as expected.

Development

In the development stage, H-E-B management and consultants will develop the schematics of the reformed onboarding training. In this stage updated training videos and exercises will include realistic training scenarios that will prepare the new partners. The updated onboarding program will be built on what is already existent and revise what is unnecessary. In continuation, the developmental stage will carry on from the redesign step, scaffolding from the importance of analytics and using what has been proven as effective across other stores. Customer feedback, performance reviews, and observations will be used in order to develop the reformed onboarding training.

Implementation

The implementation stage will bring the plans into an action plan and implement the change. Instructional designers will implement the restructured onboarding training program with updated information and realistic partner-customer situations. Infrastructure such as manager training on the new partner program, configured training models, and finalizing data analysis will take place at the beginning of the implementation phase. The recently hired H-E-B partners starting at that point will go through the new program. In this stage a performance assessment will be implemented. Organizational and individual performance will be measured via observation and customer feedback. In order to ensure that partners are performing at their best, observations will take place twice a year and will be reviewed quarterly. This is done in order to make sure all partners are aware of strengths and weaknesses meanwhile also taking advantage to ascertain any feedback on the reformed training program.

Evaluation

The last ADDIE step, the evaluation stage provides information and feedback to instructional designers. There would be a blend of evaluation in both instructional design and employee. For instructional design there would be both formative and summative evaluation. Formative evaluation will take place during the implementation phase, providing immediate feedback. Summative evaluation will take place after the implementation and learning is done; this provides a broader evaluation that includes program results. Furthermore, the employee evaluation will include general performance appraisal and 360-degree appraisal. These evaluation tool's purpose is to create a system for feedback, where not everyone is in a managerial position. This evaluation is reviewed at multiple levels ranging from department managers to regional and corporate managers, making sure everybody has a say in the process.

**Analysis and Description of the Learners**

The learner's characteristics are typically diverse, however for new HEB employees, majority of the new employees being trained are younger individuals. New employees at HEB are typically within the 16-24 age group, are in high school or college, and have diverse backgrounds depending on the area. However, in the case of instructional design, there is no single best way to design the instruction for all. The instruction must be designed in a way that complements the learner’s characteristics and ability to learn. The design purpose should consequently place majority of its focuses on the individual learners and what the learner must master to become an effective employee. In the case of new employees, learner and contextual analysis is particularly important in developing a better instructional design model. Contextual analysis comes in three types: orienting, instructional, and transfer context (Fulgencio, 1970).

Orienting Context

The orienting context focuses on learner characteristics. Taking the given age, background, and schooling of the new employees into consideration allows for the appropriate instructional design method to be implemented. It could be argued that younger individuals do not have the attention span of older individuals, who may benefit from the current method of training. However, the general complaint of the new employees is that the current method of training (videos, readings, and unrealistic training programs) is not developing their problem-solving skills and ability to succeed with customer inquiries. The learner characteristics should mold the instructional design process instead of trying to mold the learners to the instructional design process currently in place.

Instructional Context

There are a lot of factors that could come in between successfully delivering the training methods to the employees. The main deterrent for the HEB employees would be technological issues. Since videos are the primary method of instruction for the employees at this time, issues such as wireless connections, power outages, lack of equipment, and more could all effect the ability to successfully deliver this mode of instruction. Another issue could be scheduling conflicts between the employees and the supervisors training them. An employee would need to be scheduled at the same time as the supervisor for proper training to occur, and the supervisor would need to take time out of their schedule to lead the training.

Transfer Context

Lastly, applying the knowledge and skills learned will be the most important part. The previous mode of instruction did not have a proper outlet for the employees to apply what they learned, consequently leading to the employees forgetting the information learned. Allowing the employees to practice hands-on with supervision will allow them to develop the problem-solving skills they need, as well as grant them exposure to different customer inquiries including how to solve them. Learners are also more likely to transfer knowledge if they feel it can help them succeed at their job. By taking the employees thoughts into consideration, not only will the employees learn and succeed, but HEB will benefit from the improved performance of their newly hired and trained employees.

**Description and Evaluation of Task Analysis**

The instructional design steps that our team applies to identify the content considered for the training solution for new HEB employees is based upon the use of task analysis. The use of the techniques includes topic analysis, procedural analysis, and critical incident analysis. It will allow for an effective direction for our team to organize the key components derived from the HEB problem. Essentially, the first proper schematic of the content for which the team needs to consider in steps to identify correctly is the problem. Furthermore, the use of the three techniques of task analysis will deliver best results moving forward.

Topic Analysis

First the team will consider the facts which is that the HEB employees have been having concerns about their training and the effectiveness in their performances. In gathering employees’ individual remarks, the concept of our solution is to correct these underlying issues within the training methods conducted by HEB. Thus, the elements to consider are the employees, HEB management, and customers. The service provided to customers is primary focus, and to achieve customer satisfaction it is liable for HEB management to properly train their employees. Thus, the efforts of good training will allow employees to feel more confident and perform better in the workplace for the benefit of HEB. Overall, the task at large is to effectively change training outcomes for HEB workers to feel confident and adequate in their respected area of work.

Procedural Analysis

To further our task analysis process, it is crucial for the team to then conduct a procedural analysis giving step by step process of collecting and instruct information to the newly hired. First questions must be asked to trainees about their experiences, and skills they have that will benefit their role in the work area. Second, the trainees will learn cooperation skills to better understand colleagues and similar concerns they may face. Third, instruct trainees about questions or concerns they have about their job role or expectations. Fourth, gather all data from first three steps to evaluate, and handle in a critical incident analysis. Thus, through the information gained in procedural analysis the team will effectively find flaws in current training methods, and accurately propose a solution.

Critical Incident Analysis

Furthermore, after conducting a procedural analysis the data collected will help formulate a critical incident analysis to finalize the areas of most concern. The data collected shows trainees' area of concern is real workplace incidents with customers. Thus, a critical incident analysis will help in organizing scenarios where the trainees will be asked what their reactions would be. In this process the trainees social and work skills will be examined to determine where the trainee will have issues or needs improvement. Trainees will then be instructed to review over their reactions if they felt satisfied or need improvement. The data collected through the procedures of the critical incident analysis will be reviewed by our team which will then have a better understanding the issues with scenarios the trainees have a lack of skills to handle. Overall, the three techniques established a process will help to understand all aspects of trainee's issues with HEB training, and their confidence to handle workplace incidents.

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