

**Reflection on Developing Expertise**

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After reading the article by Ertmer and Stepich (2005), the terms expert and novice are more clarified in the instructional design environment. It is apparent during my analysis of the case studies that I am more of a novice than an expert. However improvement is seen in the following cases as I become a better problem solver.

### **Case 1: Michael Bishop**

#### **Problem Finding**

##### *Synthesize vs. Summarize*

After analyzing my case study for Michael Bishop, I will define myself as novice, as I summarize more than synthesize the information. I was too basic in my analysis and restated certain aspects of the case instead of synthesizing them. For example I stated, “The key design challenges that Michael Bishop faces is a correct target population, lack of performance objectives, and no development instruments for his project.” It’s evident that my response is not detailed and I provided assumptions. The assumption that I provided stated that Michael didn’t do a learner or target analysis. In addition, I didn’t state where the problem exists in ADDIE (Analyze, Design, Development, Implementation, and Evaluation) and there is no elaboration on the issues in the case study. The basic problems are addressed but I don’t clearly define the “big picture” of the problem and that was the implementation stage. It would have been beneficial to identify the other challenges that impact’s Michael’s implementation of the game such as an audience to pilot the game and beliefs of other educators in gaming.

##### *Principles vs. Features*

Actually, before writing my report for Michael Bishop, I was more detailed and concise compared to my assignment that was turned in for grading for principles vs. features. I felt that I understood the issues but I did not convey them in writing for the case study. For example on my

rough draft report, I did list all of the stakeholders, roles of the stakeholders, issues each stakeholder had with infusing gaming into the curriculum, and other notes. However, I wasn't that specific in my final graded report of the case study as I left off many details that were originally in my rough draft. After reading the following from Dr. Watson, "...you biggest issues here was leaving out some of the analysis requirements: mainly the Advisory Board being the SME's and specifically identifying the design challenges we were looking for....", I realized that I had difficulty in conveying the main principles of the case, correctly defining the roles of the stakeholders with instructional design labels, and relaying the difficulty Michael had in implementing gaming in the educational environment. Again I listed the issues in the Michael Bishop case of what was wrong and did not go into detail of the issues to get a better understanding of the situation. Ertmer and Stepich state that experts starts to articulate principles to understand the situation (2005, p. 40). For example as stated above, I am merely listing the problems: target population, lack of objectives, and no development instruments. Reading how I listed the features, follows exactly what a novice does in listing the issues. However, I did expand on the issue of Michael not clearly defining his target population but it was all assumption on my part. I stated that "if Michael would have analyzed his first target population from Oakdale District, he would have found that they are interested in new approaches to science offering individualized tutorials targeted at their after-school programs." I assumed that Michael did not do an analysis instead of expanding on the processes that Michael encounters in implementing his program.

### ***Relationship among Issues***

"Hindsight is 20/20" when looking back at my first case analysis of Michael Bishop. As stated above, I did identify a "laundry list" of issues with the Bishop case such as incorrect target

population, lack of performance objectives, no development instruments, and lack of impact on ROI (Return on Investment). In addition, when I stated the prioritized order of the issues, I wrote "...first state the ROI for the school districts, add the performance objectives, then the assessments, followed by finding the target audience." When one views my statements, I am definitely a novice because I don't show how each issue impacts the other issues or how a combination of issues could impact the gaming pilot project for Michael. However, the best thing I did was show the priorities and the chronological order of the priorities as what should happen first. Looking back, now I am wondering how I ever pulled an 8/10 on this paper as I can see more clearly all the items that define me as a novice.

### ***Reflective vs. Reflexive***

Ertmer and Stepich (2005), stated that experts make inferences often by utilizing "if-then" statements and that's something that is missing in my case study of Michael Bishop. Just like I didn't show cause and effect, I didn't show "if-then" in specific terms, and I didn't narrow my range of issues. In addition, I made suggestion based on what I think Michael should do and made assumptions in the case. In the *Key Design Challenges* of my case analysis, I started off by saying, "First of all, Michael did not clearly define his target population specifically in the general learning preference area. If he would have analyzed his first target population form Oakdale District, he would have found....." It is evident that I focused on the missing elements as a key problem and not on the needs of Michael Bishop's implementation of his pilot game.

### **Problem Solving**

#### ***Relationships among Solutions***

Even when I provided my recommendations, I wrote them as a single aspect. For example, recommendation # 1 had to do solely defining the objectives, recommendation #2 was

to create the objectives, recommendation #3 suggested creating assessments aligned to the objectives, and recommendation #4 stated to show the stakeholders their ROI for utilizing gaming within the educational environment. Reading it again, I did not define how all of these recommendations would work together or how they impacted each other in my case study analysis. I definitely didn't show the "cause and effect" of these solutions. Within the Bishop case, I didn't show how to solve the different aspects of the advisory board as well as the funding requirements of the project. Nor did I show how to take one suggestion and solve 2 or more issues within the case. I missed a lot of elements in this case as I should have stated something along the lines of "My recommendation to Michael is to convince K-12 personnel to implement the pilot game, Rigglesfish or implement it outside of the middle school classroom with another group such as after-school science or AP students." With this recommendation, I could show how the barriers presented by the school personnel could be addressed by Michael presenting the benefits of gaming, finding the correct audience for his game, and meeting the funding and time restrictions.

### *Considerations of Implications*

Showing "cause and effect" or implications of each decision is important to do as an expert in instructional design. When a decision is made, an instructional designer should look at all of the "pros" and "cons" of the case before making a final decision. I did present pros and cons for each recommendation but now looking back at them, they are "shallow" suggestions and not very insightful or "in depth." For example, my recommendation #3 was to "Michael needs to define what students will be able to do after utilizing inquiry-based science games within the classroom." The pros that I listed are: "This will help reinforce that students will be taught the skills and knowledge needed for the state assessments, thus not wasting time of

students and teachers.” And I listed the cons: “In order for Michael to go back to add the performance objectives to the components within his game, will require more time. Michael, more than likely will have to complete this project in a certain timeframe since receiving funding from another entity, and he will have to show results soon as he is halfway into his project.” Hindsight, I could of came up with on solution and showed the impact on the whole case such as “Michael needs to pilot his game outside of the middle school classroom as this would address the barriers suggest by his advisory panel and still be in the context of his target audience and complete it in a timely manner.” Actually, this was the easiest part for me to complete in the case analysis as I was just missing more detail such as other consequences of now using the target group that Michael wanted for his grant.

### ***Flexible vs. Rigid***

In my final recommendations I make statements such as the following: “Michael needs to complete proposals for schools districts...”, and “...he should begin one pilot with an after-school science club...” Within my final recommendations, I do explain why Michael should take the suggested recommendations but I don’t provide any other options to the solution. If I had to rewrite my recommendation I would put something along the lines of “Michael needs to complete proposals for school districts but that doesn’t mean they are going to be accepted by the personnel. If this is the case, then Michael could... (*provide another suggestion*).” When rereading my case analysis, it’s obvious to me that I was very rigid in my statements to imply that it was the only best possible answer.

### **Case 2: Craig Gregersen**

#### **Problem Finding**

#### ***Synthesize vs. Summarize***

Reviewing the Craig Gregersen case, I would say that I improved in synthesizing the case, but still summarized some portions. I missed out in being concise and detailed in my wording that would have aided me in synthesizing over summarizing. In my issue 1, I do attempt to synthesize when stating “....Craig needs to perform an in-depth front end analysis of various departments within Electron. The most important level he needs to concentrate on in the Analysis state from ADDIE. Once Craig aligns all of the input from the stakeholders, he can align them to the goals of the company. Of course....Craig needs more than 5 weeks total to collect the information and finalize the training.” Looking at this statement, I could synthesize my statement better such as “Analysis is the issue in this case as Craig is receiving various input and needs from the department: legal, engineering, project management as well as a breakdown in communication, a tight deadline of five weeks, and challenges of training over a large geographical area.” It’s amazing to me that once I took time away from the case project and reviewed it at a later time, how much easier it is to see the novice work of my case study and the portions that can be improved.

### *Principles vs. Features*

Again, this is a category that I believe I improved over the first case, but yes I still classify myself as a novice. I stated, “Priority for Craig is to first gather all of the stakeholders of domestic and internationally involved and have an open dialogue about what is needed in the training. All of the stakeholders have varying points of view as the engineers and Stan want specific training for all employee levels and Richard and the legal department would like a very general training designed that doesn’t cover the specifics of product liability nor topics that engender the company in a lawsuit.” I miss out of providing abstract conceptual principles. Even

though I know what the problem is such as explaining ethical concerns and lack of a needs analysis within the company, before training would be developed.

### ***Relationship among Issues***

I stated the following for my relationship among issues:

The short timeframe and lack of communication need to be directed. Five weeks total: 2 weeks of phone interviews and 3 weeks to develop the training, is not enough time to complete the training. And, time has not been included for designing the training for all learners. The communication and lack of disagreement between legal and the engineering department need to be improved. Louis, the project manager, should not be hesitant to talk to legal and should do so to show collaboration among department.

I was able to show in my description that these issues impact the larger issue of Craig and his project problem. However, this could be improved if I would have shown the relationship of the lack of the needs analysis lead to a 5-week preparation to develop one-day training, as this could have been avoided if the needs analysis was done. The needs analysis would delete the communication gap among the stakeholders in the company and the discrepancies that existed between legal and engineering. This further would lead to Craig explaining to Louis that developmental timeline of the course needs to be lengthened.

### ***Reflective vs. Reflexive***

Rereading my case scenarios and utilizing a possible scenario, I do believe that I suggested possible tested scenarios based off of what I know. I did see an improvement in this area from the first case analysis, and started showing signs of expertise. However, I am still a novice overall. I stated, "Craig needs to bring up ethics to all of the stakeholders iterating that the



liability training will uphold the reputation of the company with his training. This action should help Craig utilize the case examples for the training in the best interest of the company.” Now I can view the “if-then statement” such as if Craig brings up ethics to all involved it will uphold the company’s reputation and allow him to utilize the case studies, and I avoided focusing on what I don’t know.

### **Problem Solving**

#### ***Relationships among Solutions***

Within my solution for Craig, I do show a hierarchical approach in a chronological order and show a “plan of action” and implementing signs of expertise. It does address the issues that were stated previously in the case, implicitly. For example in part of my recommended solution I proposed the following: “It is recommended that Craig meet with the stakeholders both domestic and international as this would incorporate training needs from other stakeholders” and SME’s for overseas. He needs to provide a report showing why a needs analysis needs to be completed. Immediately, Craig needs to request an extension to gather all data needed in order to design solid training that incorporates product liability from SME-s from the other departments and countries.....” However, the one small portion that I could improve on in this area is when providing the solution to actually link it back to the issue previously stated, explicitly.

#### **Considerations of Implications**

When stating my pros and cons from the Gregerson case, I do make attempts at explicitly how the solutions might be implemented and the implications of the solutions. One of my solutions is stated in a shortened form as follows: Craig needs to have a meeting with stakeholders, explain the needs analysis that would lead to development of the training, explain the current situation and obstacles and how it impacts the company to develop the needs and

goals of the company, map the performance questions as this would allow Craig to see what needs are training for product liability, request an extension of time because an analysis will take weeks and utilize the training developed by both the engineers and legal.

My pros for this scenario are “If stakeholders can come to a consensus regarding the training and the extended timeline, then the objectives can be more clearly defined, and the content and the instructional materials can initially be developed, or enhanced. Using existing trainings and modifying will save Craig and the company time and money.” And my cons for this scenario are “It may be difficult to get all stakeholders involved especially from various countries at one time. Louis might not grant the extension of the development of the training, so it will be impossible for Craig to complete it with the original timeline. Richard and Stan might still disagree on the content and delivery of the training.”

I am starting to understand while reflecting on the suggested implications, that I am thinking through more of the outcomes of the scenario suggested and weighing what would happen next in the scenario. I do believe that I still need to still consider all possible solutions and think more deeply about them, and expand on the possible consequences of the solution. For example, I could have suggest in “more depth” the result of Craig creating a training that is inadequate for the employees, or Craig’s reputation if he fails at the design and development of this training. However, I do see improvement from the first case and I am starting to move away slightly away from a “pure novice” in this category and moving towards the expert as I am stating more implications and the effects that the implications contain. But I still would not label myself an expert.

***Flexible vs. Rigid***

What an eye opener it is for me to read my final recommendations in the Gregerson case. I am definitely rigid in my response and I don't offer flexibility of any type. In fact, I sound like a "drill sergeant" as I use words such as: "Craig needs provide a report...., Craig needs to request an extension...., Translators need to be hired ....., Craig needs to further express needs to get analysis data of product liability...., Ethics training needs to be infused into liability training...., An overemphasize needs to be placed on the Code of Ethic's Principles...."

I ended my final recommendation by saying, "Once all the above mentioned is completed, Craig can begin the design and development stage for the product liability training for all learners."

Wow, I made it sound so simple that if you "do this" then "this will happen" like magic, with no repercussions. It obvious to me that I need to be more flexible and state that my suggestions might not go as planned, thus making me a novice within this category.

### **Case 3: Abby Carlin**

#### **Problem Finding**

##### *Synthesize vs. Summarize*

Finally, I start synthesizing information in the Abby case and provide an overall representation of the issue. I am actually starting to understand and recognize, by writing this reflection, my statements that are better synthesized compared to just being a summary. I believe in this case, I start to "turn the corner" and understand the whole situation of the problem as I start to improve in this process. For example I stated:

Abby needs to develop training for new employees who have never operated the machinery. With no prior knowledge of manufacturing, Abby has concerns over documenting the steps of the machinery with logistical constraints such as high noise levels, poor lighting and no communication with the current SME's. No prior written

training materials exist, and the rushed timeline of implementing training with three shifts of new employees **within the next 90 days without losing production, adds to this concern.**

### *Principles vs. Features*

Again, I am getting better at stating the principles of the case but I am still listing issues. However, I do start to state principles impacting the project such as recognizing Abby has an implementation issue that was implicitly stated. I still need to improve in this area to become more of an expert and not a novice, but I do see my improvement from case to case. For example I stated:

Abby is against a tight timeline in developing, delivering, and implementing the new training for the new employees and has no prior information on how to operate the stamping machines. No prior training manuals or documentation exist on how to operate the machines. Training has to be completed in 90 days for three shifts of employees without stopping or losing production and her SME's are not cooperating. Her biggest challenge is implementing the training to new employees.

### *Relationship among Issues*

I start building a relationship among the issues in the Abby case and infuse how each issue can affect the next. Stating, "The first thing Abby should do is solve the environment barriers in the plant: poor lighting, loud noise, and lack of communication with the current employees. This will help her gather the data for a task analysis to design the training. Once the environmental and communication barrier are "of the way", she can move to implementing the training against the 90 day timeline for the new employees.

As noted, I am starting to capture not only the main issues but also the underlying issues of the case on how each issue does relate to the other. I realize that the environmental issues do need to be solved; otherwise Abby won't be able to be successful at implementing the training. And, yes, I could still improve in this area by showing more relationships within the case such as including the knowledge and skill level of the new employees that would be trained as well as unmotivated SMEs.

### ***Reflective vs. Reflexive***

I could have been more reflective in my approach to the Abby case. Using the given readings did help me to provide different scenarios of the case. I stated the reading by Erven (n.d.) as follows: "The paper from Erven (n.d.) iterated that trainers need to see the job from the perspective of the employees. This confirms that Abby needs to be on the floor to view and communicate with the veteran employees to perform her task analysis so she can move the design stage of the training." This knowledge helped me solidify my reasoning for Abby to be on the main production floor to communicate with the SME's in order to design and develop training for the new employees. My "downfall" of this case and where I actually lost a fourth of a point, is that I never infused my experience into the case. Actually, I know about working on a production line: vinyl extrusion and recreational vehicle factory, and how important it is to keep production going at all times. It was rare in my experiences; a production line in either environment was shut down. Even though I didn't state this in my case analysis, I knew not to shut down a production line during a peak time unless you have another solution to make up for that lost production. Again, I need improvement at reflecting on my knowledge to impact the solution.

### **Problem Solving**

### *Relationships among Solutions*

Within my solutions and recommendations, I actually provided solutions that were more organized and had relationships with the other factors of the Abby case. Each suggestion is in order and I state the effect of the solution. Comparing this to my other case studies, within the Abby case, I show the relationships among the solutions the best within this case. My first solution stated:

Abby needs to overcome the environmental barriers in the plant to collect data for the task analysis. Abby can bring in industrial lights for better visibility for her observations. Once she has better lighting, she can add video cameras on tripods to record what steps the veteran employees are taking when operating the machines. In order to counteract the noise, she can post a note on the bulletin boards announcing to having a short meeting in the break room where Abby can impress upon current employees about the importance of understanding specific steps on the machines, and how she plans on incorporating two way radios with headsets and texting capabilities to communicate with them on the floor as she video tapes and observes them. Using video cameras will allow her to record their actions so she can review the recording to document the steps. The headsets will allow Abby to use verbal interviews of the workers to gain the data for the task analysis, interviews, and pilot testing the employees on the training content and documents. She will interview the veteran workers after their shift and provide overtime pay as an incentive to increase motivation and facilitate communication.

Reading this statement again, I can actually see the connection of the solutions and why it is being recommended. I would have to say that I did this portion of the case well and that I moved off of the “novice” baseline. I won’t say that I am a total expert within this area but I am

definitely getting closer. This was the first time that I also offered an option to a recommendation in my case analysis by stating:

Another option to training the employees is comparing the money FDM would spend on overtime for the veteran and new employees for training and comparing it to the monies lost in production by shutting down one machine. If fewer monies are lost in production by shutting down one machine on the line, compared to total monies spent on payroll, then it would be suggested to utilize this scenario.

This statement proves that I am seeing many relationships and possibilities to the solution to the case.

### *Considerations of Implications*

Considering the implications in this case, I believe I stated them well. The implications to my suggested scenario stated directly above included the following:

**Pros:** Industrial lights would allow workers to see better and for Abby to document the steps of the operating the machines. Temporary lights using existing outlets would be less expensive and quicker to implement than having electricians permanently install new light fixtures. Video cameras would allow her to observe the workers and the radios to communicate with them while they are on the job. Plus Abby could review the videos at any time. The two way headset radios and texting could be a permanent fixture on the plant floor with long term benefits by allowing plant managers to communicate with their employees as well as communication between employees while operating the machines. Studies from Motorola show that communication increases plant production and efficiency as well as decreasing capital costs, increasing employee productivity, better decision making, and improved employee safety (Motorola Solutions, 2013, p.3).

**Cons:** Costs to purchase and install industrial lights, video cameras, and two way radios with headsets with texting capabilities could be prohibitive for the company.

In the suggested “pros”, I actually stated “the why” and how it would impact Abby’s problem for the better in detail. This is an improvement over my past cases when considering the implications. Within my paper, I also addressed the unmotivated SME’s who just want to retire and not train the new employees and how they need motivation and incentives, the time involved in training and how help to meet the deadline and, the idea to shut-down or not shut-down a production line and comparing it to money saved or lost, retrieving training information from the manufacture of the machines and the costs involved.

### ***Flexible vs. Rigid***

In the same way that I approached the previous cases, I am rigid again in my solutions of the Abby case. I will say it again, “hindsight is 20/20” and if I had the opportunity to redo this section of my case, I would do it better. I feel I know the effects of each solution suggested but I don’t explicitly state it but I do think it. However, in my “pros and cons” of my case, I am flexible to the solution as I do state what could or could not happen with my recommendations, as stated above. The following shows my “novice” rigidity in my final recommendation:

Abby needs to work with Andrew in getting video cameras and 2-way radios into the plant to increase communications between her and the veteran employees so she can get the steps needed to operate the machines for her training. Contacting the manufacturer of the machines for any documentation, video clips, or a trainer would give her additional content on how to operate the machines. Once she obtains the equipment she needs to perform a task analysis, she will communicate with the employees via notes on the bulletin and discussion in the break room of her plan and the objectives she needs to



accomplish for the training with the SME's help. Next, she will work with Andrew and company management to offer monetary incentives, overtime, for any veteran employees to help her with the content, interviews, surveys, pilot testing and implementation of the training. As stated by Motorola 30 to 40 percent of profits can be lost annually due to downtime in the company so it was determined to offer monetary incentives to veteran SME's rather than "shutting down a machine" and losing production (2013, p. 1). Abby will create job aids and short video clips for new employees to view prior to stepping foot on the plant floor. These job aids will help the new employees at any time during while operating the machines. Further monetary incentives will be created with Andrew's help to obtain 3 or more veteran employees, after their official retirement, to work with the new employees for one week, on the job training. When the new employees start, they will have an orientation in the break room on safety, view the visual materials created about the operating the machines, and be provided with their job aids and how to utilize the machines. The new employees will also have access to the 2-way radios to always contact Andrew or other employees on the plant floor for any issues that arise when they start operating the machines. The veteran employees that have agreed to extend their work one week after retirement will work on the job with the new employees going through the needed steps to operate the stamp machines. This final recommendation will allow Abby to finish her task analysis and create the content needed to implement the training and at the same time keep all the machines up and running for production while utilizing Dr. Abbott as coach throughout the whole project.

#### **Case 4: Jack WaterKamp**

##### **Problem Finding**

*Synthesize vs. Summarize*

Reviewing the Jack Waterkamp case, I do believe that I could have done a better job synthesizing. I could have taken all of the issues stated below, and synthesized it into one overall issue. This case was difficult for me to analyze due to all of the stakeholders and issues that Jack encountered from the different departments. Furthermore, Jack was also a project manager besides of being just an instructional designer that aided in the difficulty of this case. Since, I am not familiar with the direct duties of a project manager, it made it difficult for me to decipher all content involved with the case from a project manager role. However, I was able to state the issues that Jack had to deal with in regards to the project manager role as the following:

Jack's role is coordinating the roles of the employees and managing the activities within the project to keep it on time. His procedures should regulate the production activities (Yang, Moore, & Burton, 1995). There are disconnects between Jack and R & D (Lewis) for the development of the software for the training and between Melissa, Client Services Director, in communication. Jack also is getting involved with pricing of the web-based training and that's marketing's responsibility.

I did begin with the broader issue and stated issues that impact the broader issue. For example, I explained issue one as the following:

After Jack completed the approved training curriculum for the new CRM software product for development, the executives decided to change the training to include web-based training along with classroom-based training. This is also called "scope creep" when changes are made to **the design and delivery** of the project in ADDIE (Analyze, Design, Develop, Implement, Evaluate). The executive team decided that the delivery date for the CRM software product and training curriculum is November (9 months) and

is non-negotiable along with the original budget (\$280,000), and staffing: graphic artist, audiovisual specialist, programmer, and designer. Jack feels he needs 3-4 more times his current resource levels to add the web-based trainings.

I did recognize “scope creep” and changes needed to be made to the design and delivery of the project as this was not explicitly stated within the case. However, I could have synthesized the information regarding the executives in terms of a mandatory delivery date.

In addition, I further synthesized the following, as it was not clearly stated in the case: “Product **training development** and **product development** are happening simultaneously. Jack and his team need to develop instruction for the web-based training on the use of a product while the software that’s needed for the training is still in development.”

### *Principles vs. Features*

From the given statements from this case stated above, I do feel that I provide principles and not features of the case. For example, I did identify “scope creep”, training development and product development are happening simultaneously, and Jack’s role as the product manager should be regulating the production activities. Definitely, I see improvement from the first case, where I did just “list” feature after feature.

### *Relationship among Issues*

Particularly on the WaterKamp case, I could have showed more of a relationship among the issues as I didn’t show more details and depth of the issues. And, this does make me more of a novice within this portion of the case. For example stating:

Jack’s immediate priority is getting all of the modules completed and sales-ready by the November launch date. Communication and project management is key for Jack to be successful, so Jack has to confirm with Lewis if the Gantt Chart is correct on the beta

testing of the modules. Next, Jack has to check in with Katherine regarding the functionality of the 3 modules and keep in close contact to get this completed. Jack needs to show Melissa his evaluation results from his previous self-paced training for the online refresher courses and research showing how web-based trainings are successful. Since Jack went over budget, he needs to deduct the \$1,700 from another budget area in the project to balance or show the executive the research behind creating web-based modules and how it takes 3 times more resources than classroom-based training. Executives are more concerned about the product being completed, workable, and done on time.

A chronology order is identified in my above statements, but I don't specifically and directly show the relationship. For example, I could have stated that if the Gantt Chart is incorrectly updated by Lewis and communicated to Jack the project could be closer to being developed on time, thus allowing more time to pilot test the developed modules. Also, I don't show why it's important to show Melissa the evaluation results as this would get her involved with the training in order to help Jack get the product done on time with the help of her trainers.

### ***Reflective vs. Reflexive***

I tried to be reflective in my understanding of "scope creep" that effects the design and development of Jack's project as well as the communication and management issues that exist within this case. Utilizing the case readings did help me be more reflective, as I didn't have experienced being a project manager. I stated:

The article by William van Rooij (2010) relayed project management as an important discipline to have as an instructional designer since many have to manage projects within the real world as they both require specific skill sets. Besides project managers having to initiate, plan, execute, monitor, control, they also have to possess interpersonal skills such

as communication and leadership (William van Rooij, 2010). Jack, not having project management experience in his background needs to work on his interpersonal skills with Melissa and Lewis. Crawford & Pollack (2007), Horine (2005), Rowe (2007), Stubbs (2002) verified a successful project is on time, within budget, and meets the requirements of the stakeholders (as cited in William van Rooij, 2010, p. 855). When a person is an instructional designer project manager, that person has to not only define the project and schedules, manage change and processes, but also operate in an organized and efficient manner and create time to team building (or “soft skills”) (William van Rooij, 2010). The soft skills are Jack’s weakness as shown in his miscommunications with Melissa on the sign-off of the project charter and obtaining her trainers for facilitation on web-based training.

I did show the how this knowledge can be utilized in the case and what Jack should do in order to solve his management of the project.

### **Problem Solving**

#### ***Relationships among Solutions***

My ideas for a solution to Jack’s problem are organized in an orderly fashion, cover a certain timeframe, and do provide insight into the effects of each solution. The solutions provided do link to the issues that I stated within the case:

Jack needs to connect with Lewis and confirm the completion percentages of modules 1A & 1B for software development. However, even if the percentages are higher for completion, more work has to be done such as testing the modules near the September deadline, even if 2 weeks later. Then, Jack needs to call an immediate meeting: curriculum staff, graphic artist, audiovisual specialist, Jerry the programmer, Lewis and

his team, Katherine, and Melissa. In the meeting, Jack needs to show Melissa the research behind the successfulness of web-based training to make her feel more comfortable. Jack needs to make a suggestion to use Melissa's 58 trainers that have not been trained in the online facilitation workshop and are the end users to help test the modules as they closely represent the target audience. The trainers will test the modules in groups as they are getting completed from Lewis' team, Katherine (SME) and Burns the programmer simultaneously. It should be suggested that anyone who does not have an upcoming due date before the November launch of this project, needs to put all of their time and dedication into getting the modules completed, and tested to provide improvements for the launch date. Due to the modules needing more time for completion, Jack can extend the deadline of the curriculum pilot testing by one week to get this to 100% completion. Next, Jack has to rewrite and update the written communications plan to include an update on who still needs information and the timeline for that information, how information will be provided and by whom. After receiving the information from the meeting, Jack will distribute the updated information, update the Gantt Chart, and closely communicate with all team members on a daily basis to get this project done on time.

Of course, I still see the need more for me to continue to show relationships in an expert manner and refrain from just itemizing issues that can't connect to one another.

### ***Considerations of Implications***

Overall in the Waterkamp case, I have been able to show the implications for each solution that I have offered. This case was difficult for me to find the perfect solution to the issues, but the implications have been thought out. I explained the implications for the following issue stated above:

**Pros:** Clear objectives will be defined from the meeting and communication will be ongoing in order for the project to get done. Jack can reassure Melissa's fears regarding the web-based training. Having all involved with the testing can help them get everything refined for the launch date.

**Cons:** Melissa could refuse to share her trainers for pilot testing (evaluation) as originally she stated she didn't want to sacrifice trainers because they lose billable days.

Reviewing these implications now, I see that I could have gone more "in-depth" and mention how these solutions would be put into action with more detail. For example, I could add why "calming" Melissa's fears would help Jack within his case, or the what would happen if Melissa doesn't agree to Jack's suggestions as what would be Jack's next step with the project, or how to get Melissa involved with the training solution of the project.

### ***Flexible vs. Rigid***

The following was stated as my final recommendation for Jack Waterkamp:

Jack needs this project definitely completed for the classroom and web-based trainings for November for the sales-ready curriculum launch, otherwise his project will be a failure and will have implications from the executives for all involved. The biggest setback is the incomplete modules for the product software that need to be tested by September. Jack needs to call a meeting with all involved and their teams: curriculum development, Katherine (SME), Melissa, Lewis, Tom, Jerry, and Melissa, with the backing of his boss, Elizabeth. Jack needs to show everyone the Gantt Chart at its current status and receive input from everyone on where they are exactly on the project. Melissa needs to be shown research on how web-based training is as beneficial as classroom-based training. In addition, Jack obtains permission from Melissa to use her 58 trainers

that have not completed facilitation training to test the modules as they are being completed from R & D as they can complete them internally off the company's hosted website and provide feedback. This will satisfy Melissa as she was against the SAs doing an evaluation. All the modules should be developed simultaneously. Using the trainers will allow Jack to take from the pilot budget and apply it towards the trainers while at the same time recovering the \$1,700 he used to spend on the flash drives. Within only a few weeks left before the completed pilot testing and 2 months before the launch for the sales curriculum, Jack needs to write a clear communications plan indicating who needs information and when it's needed, who will provide this information and how will it be communicated between parties. Jack needs to stay on top of this communication plan and the Gantt Chart process on a daily basis with such a tight deadline. If by any chance the modules do not have full functionality, then the end-user functionality will be skipped for the pilot testing in September as these are minor issues such as limited entry fields for email addresses. A prototype of the missing functionalities can be used in place of the real thing. With every available body working on the project, the project will be completed in time for the November launch date and deemed a success.

Again reviewing my main solution, I am very rigid in my suggestions. In all of the cases, this is the one area that I haven't been able to see much improvement. I definitely continue to be a novice within this arena as I don't show scenario changes or what could happen if a certain situation took place. My suggestion is regimented and doesn't allow room for modifications. For example, I could expand on what if Jack is not given more "man-power" for the project, what could happen and what could Jack do to recover from this scenario. The one small glimmer in



this case for being a little bit flexible is when I did state in the above recommendation that “if the chance the modules don’t have functionality, then the end-user functionality will be skipped.”

### **Action Plan for Moving Forward**

My goal moving forward is to be an expert in the field of instructional design by utilizing tasks in the problem finding and problem solving stated in the Ertmer and Stepich (2005) article. I do realize that my expertise will be built on experience, and conceptual knowledge, and to achieve both will take time. In addition, I plan to reflect on all design issues to view what went well and what didn’t go well and why while comparing it to the two major tasks of problem finding and problem solving. This reflection has been an “eye opener” to what I can do better, to be a better instructional designer. It would have been very helpful to read the paper by Ertmer and Stepich (2005) prior to the case study analysis. However, I also realize that reading the paper presented first by Ertmer and Stepich (2005) might have allowed for “false reflections” on what are really are our strengths and weaknesses in analyzing cases. The most difficult items for me to develop were synthesizing and stating the principles in a problem when problem finding. In addition, I was really weak at presenting flexible solutions when problem solving. The good news is not that I am aware of my weaknesses so I am able to concentrate on improving them. It was evident through the progress of analyzing the case studies; I did improve in all of the areas to some extent. It was very difficult for me to be concise in all of the case studies just as it is difficult for me to be concise within this reflection, and that is something that I plan to improve. I look forward to continually improving in order become more of an expert. And, I can see utilizing problem finding and problem solving techniques in other areas besides instructional design such as project management, business plans, and lesson plans in K-12 education. I think one has to think like more like an “expert” in order to become more of an “expert” in

instructional design. In order to help me with my action plan, I will stay connected to other professionals and experts in the instructional design field for advice and reflection to certain problems within instructional design. One way to stay connected to other experts and professionals is by joining instructional design professional learning communities through “Linked In” and “Facebook” and Purdue communities from my studies.

*My action plan is as follows:*

#### *Problem Finding*

I plan to work on synthesizing issues to one or two overall issues using my knowledge and terms to avoid recounting information.

I will reflect on the bigger, underlying issues and problems in an instructional design problem instead of relaying information that is concrete.

I will always develop a relationship of the one or two bigger issues in an instructional design project. And I will show how each issue impacts the other as I will no longer list each issue in isolation.

I will not make assumptions about the problem but base the problem about what I do know to state possible educated scenarios and what could happen positively and negatively with each scenario. I plan to collect information in the problem that can be directly related to the situation.

#### *Problem Solving*

I will devise plans that offer solutions that are organized, connected, and show various outcomes based on the cause and effect relationship, and avoid presenting plans that are just itemized with no connection.

I will consider all implications of a detailed single solution to a problem, showing how each implication can affect the problem and how these solutions can be implemented in a reasonable manner.

I will present my solutions with more variety and flexibility to allow for various adjustments within the problem compared to presenting a definite, unaltered solution.

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