

# **Instructional Design Document**

**LEADERSHIP SKILLS FOR FUTURE LEADERS**

# Project Proposal

## Project Title

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Leadership Skills for Future Leaders

## Sponsoring Organization

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Commercial Bank, the Quantitative Research Department, 500+ employees worldwide

## Project Description / Problem identification

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The top and mid-level managers in the Quantitative Research Department expressed the need for training based on their previous and current experience. They believe that the bank's expectations for future managers are not clear and well-articulated.

## Aim

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The aim of this proposal is to understand the many characteristics of leadership: motivation, emotional intelligence, communication, leadership style, coaching, mentoring, and assessment. The training is intended to set up a coaching and reverse mentoring process that will cover all of those leadership traits and help participants chart a path to success.

## Target Audience

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The target audience is potential future leaders.

## Delivery Options

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Commercial Bank is a global company with offices worldwide. In response to that geographic spread, the leadership training will be entirely online.

# Instructional Need

## Instructional Need

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Bank management concluded that leadership development is crucial and decided to offer training to improve those skills. The human resources (HR) department will be responsible for the training. The company is in a new phase of development, in which change is promoted at different levels; leadership development is one of them. There are defined performance problems and needs: the expectations for future leaders are not clear, and there is insufficient support at the individual and organizational levels. The focus is on the opportunity for potential leaders to expand and fulfill the requirements as leaders.

## Needs Assessment

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The managers believe there is a lack of skill and knowledge at the company's organizational and individual levels. The instructional challenge is the lack of leadership skills, socialization, and support for company managers. Middle and top managers claim that there is no established professional development policy, strategy, or leadership practice at the organizational level. They also feel that the HR department should be responsible for leadership development and should be the office that develops and oversees the training. HR agrees that middle and top managers' expectations and responsibilities are not clear, which sometimes leads to miscommunication and a lack of constructive feedback for leaders at the individual level. For our study, this represents an anticipated or a future need because it focuses on a performance problem, and seeks to fulfill the related requirements.

### 1-2. planning and collecting the data

One of our primary goals is to identify the stakeholders, get 100% support for the project, and discuss every challenge the program might face. The broader audience will include top and middle managers and HR department professionals. The HR department and the top managers will act as subject matter experts (SME).

Audience and method of data collection:

#### A. one-on-one semi-structured and focus group interviews:

- HR department employees (one-on-one)
- top managers, members of the board (one-on-one); identify the stakeholders
- middle managers, and candidates for promotion (one-on-one and focus group)
- a focus group of selected employees (focus groups and survey)

B. document and content analysis:

- design a feedback system
- assemble relevant documents about learning
- managing talent development
- practicing organizational coaching, mentoring
- leadership skills

Most of the one-on-one interviews will take place online. A follow-up interview will sometimes be requested to review and confirm the information. If possible, focus group interviews will be conducted on-site.

All documents related to organizational learning and support will be requested. A lack of irrelevant documents could risk the outcome of the assessment. In this case, documents should be produced during the process.

3-4. analyzing the data and the final report

The interviews will be analyzed using qualitative content analysis. Survey data will be analyzed using a quantitative method. To prioritize needs, the Delphi method will be used. A summary of the findings will be produced, including relevant recommendations.

# Learner Characteristics

## Learner Analysis

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### Primary Audience

- potential leaders
- current middle and top managers

### Secondary Audience

- employees of other departments
- board members and CEO

### General Learner Characteristics

1. General characteristics: gender - 75% male, 25% female, education - 60% PhD, 40% MA; age - 15%: 20-30 yrs., 55%: 31-40 yrs., 15%: 41-50 yrs., and 15%: 51-70 yrs.)
2. Specific entry characteristics: computer skills mastery level 100%
3. Learning styles: how individuals approach learning tasks and process information: Learners prefer visuals and audio and like to learn in smaller chunks.
4. Personal and social characteristics: expectations: clearer expectations towards leaders, most of them internally motivated, previous experience: 55%
5. Culturally diverse learners: learners from all over the world

### Entry Characteristics

- computer skills
- collaborative learning

The target of instruction is a culturally diverse, global audience. Therefore, the training will be inclusive, representing the group's diversity. One expressed goal is to make all voices heard. This openness will be supported by peer-review exercises and discussions, in which anyone can propose a challenge or a topic of concern.

## Contextual Analysis

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### Orienting Context

- Learners take this training because it will represent their expressed needs and expectations.
- Learners see the training as providing information and helping develop skills.
- Communities of practice will be built and supported based on the training. The mentoring system will function and later be implemented as a relevant part of the feedback and promotion system.
- A potential misconception is that this is just another training.

### **Instructional Context**

This training will be entirely online because employees are located worldwide, in many time zones.

### **Technology Inventory**

Because the training is for the Quantitative Research Unit of the bank, everyone is skilled at using and learning new technology.

### **Transfer Context**

- Knowledge and skills will be applied continuously.
- Learners will use new knowledge and skills in their everyday life.
- Based on the findings and the training experiences, a mentoring system will be launched in the department. The HR department will create collaborative learning opportunities, and communities of practice will be supported. Coaching will be available.

# Instructional Impact Based Upon Learner Characteristics

## Application of Learning Theories

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The target audience is adult learners. Therefore, it is vital that we rely on adult learning theories (instead of pedagogical ones). There are specific points that we must consider when designing programs or courses for adults.

Our program (including goals, objectives, assignments, and assessment) and our communication must be transparent. We must be open and encourage feedback, not just at the end of the course but also during the course. If needed, instructors should make appropriate changes to course structure. Adult learners usually act as responsible and knowledgeable learners; the entire instructional approach should be focused on those traits.

The following learning theories will be applied.

Adults have previous experiences that can affect the learning and teaching process. The expertise they bring offers excellent added value to the learning process. As Knowles stated, there are four principles for teaching adult learners. Experience is one of them. Adults also prefer problem-centered instruction. They are involved in learning, and it is essential that learning and instruction have relevance and impact in their lives. According to Knowles, adults are internally motivated, problem-oriented, ready to learn, and self-directed. (Knowles, 1984)

Gagné's nine levels of instruction are useful when considering the whole learning process. Those levels include gaining attention, informing learners of objectives, prior learning, presenting content, providing guidance, practicing, providing feedback, assessing performance, enhancing retention, and transferring to the job. Particularly useful is the first level of gaining attention, which we concede can sometimes be challenging. (Gagné, 1985)

Sweller's Cognitive Load Theory is about how learners' short- and long-term memory relates to instruction. According to the theory, instructional design can reduce the load on working memory with limited capacity, promoting the transfer of knowledge to long-term memory. (Sweller, 1988)

Kolb categorized how adult learners learn and what learning styles they can develop in his Learning Styles and Experiential Learning Cycle model. He states that experiential learning is cyclical, occurring in four stages:

- relevant experience
- reflective observation
- abstract conceptualization

- active experimentation (Kolb, 1984)

Also applied in the study will be the Kirkpatrick Four-Level Training Evaluation Model, which focuses on the impact of instruction. The four levels of the Kirkpatrick Model are listed below:

- Reaction – how did learners react to training?
- Learning – did they understand the training?
- Behavioral change – did they utilize what they have learned?
- Organizational performance – did the material have a positive impact on the organization? (Kirkpatrick, 1994, 1996)

## **Application of Motivational Theories**

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One of the most important characteristics of adult learners is that they want to learn, know the purpose of learning, and understand how they will benefit. They typically learn because they are internally motivated. However, they can also be responsive to external factors, such as a promotion or career change.

Self Determination Theory states that “individuals have a basic drive toward growth as humans and that the needs for autonomy, relatedness, and competence are at the core of this drive.” (Houde, 2006) It means that there is an inherent need or drive to grow, which can take the form of learning. This drive can influence the design materials for adult learners. It is essential to create and present materials adults find interesting enough that they continue their learning process.

## **The Impact of Diverse Audiences on Instruction**

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The target audience:

- is culturally diverse
- embraces a variety of positions
- reflects different interests in learning
- is willing to take on a variety of responsibilities

Our study will use examples that reflect the cultural diversity of the company. Because diversity and equity are two critical strategic factors, they should not be neglected during the design process. Different points of view expressed by people from different backgrounds and positions will be collected during the Needs Assessment.

