LEAVING ADDIE FOR SAM
Field Guide

Guidelines and Templates for
Developing the Best Learning Experiences

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Foreword by Michael Allen

FOREWORD

Harold Melvin and the Blue Notes:

Wake up everybody no more sleepin' in bed
No more backward thinkin', time for thinkin' ahead
The world won't get no better
If we just let it be
The world won't get no better
We gotta change it, yeah, just you and me.

Grammatical issues aside, this powerful admonition hits me hard and personally, and it's a fitting challenge for all of us. The extraordinary power of technology to deliver instruction to hundreds, thousands, and even millions of people puts an extraordinary responsibility and opportunity at our doorstep—the responsibility to deliver learning experiences of value to each recipient, and the opportunity to make the world better.

The time each learner spends on any task is irretrievable. Once spent, it's gone. Interest and motivation, performance confidence, and self-image are at stake in learning experiences. When done poorly, our creations can dampen them all, while we also waste the irreplaceable asset of an individual's time. When done well, doors open, skills develop, and performance excellence yields personal and organizational rewards. People grow in ability, confidence, motivation, and happiness.

So much weighs in the balance, and yet tradition is an enduring master. We continue to make the same assumptions about what constitutes good instruction without truly facing up to the missed opportunities and even the damage that may have been caused by ineffective, boring experiences. Many of our colleagues don't recognize design errors and pedagogical weaknesses, while others simply refuse to change. We use old, inherently weak, and impersonalized instructional paradigms. We know, or should know, how to do much better, but authors continue to sacrifice the invaluable personal assets of learners to save time and effort in developing instruction.

Tradition is relentless. As Tseitel sang in *Fiddler on the Roof*:

> *Hodel, oh Hodel, have I made a match for you.*
> *He's handsome! He's young! All right, he's 62.*
> *But he's a nice man, a good catch. True? True!*
> *I promise you'll be happy. And even if you're not,*
> *There's more to life than that. Don't ask me what!*

What tradeoffs we've been willing to make for the safety and convenience of tradition! Worse, when we think of innovating, we prioritize reduction of development costs and effort over creating more compelling learning experiences. We've shown quite a willingness to sacrifice learner benefits while wasting so much of their time.

No More Backward Thinkin', Time for Thinkin' Ahead

Indeed, *"The world won't get no better, if we just let it be. . ."* Ignoring the double negative, this is simple and profound; but change is hard. Even with great concern about faults where we recognize them, there are thousands of ways to defend and justify not doing the right things.

I've contended that in e-learning design and development, one consistent yearning is for a fast and easy way to do what's inherently difficult and time-consuming. We have the notion that an easy path exists; we only need to find it. Not so. Despite the availability of so-called "rapid" authoring systems, developing learning experiences that are meaningful, memorable, and motivational takes hard work. Thinking. Exploration. Revision. Validation. There's no easy way to create a successful movie, a bestselling book, a great play, or impactful instruction. It takes intense focus, a critical mind, a sharp eye, an inventive spirit, and much more.

We Gotta Change It, Yeah, Just You and Me

Fully cognizant of the time, effort, and talent great e-learning design and development require, I've spent decades trying to define effective methods and simplify them—to decrease the time required while also increasing the certainty of impressive success. I'm not the only one who has taken on this challenge, of course; but many such efforts, in my view, have resulted in methods that either 1) overly complicate the matter or 2) overly simplify it.

I'm not very worried about overly complicated approaches. They stimulate fascinating theoretical discussions, but attract only limited interest in a haste-driven world. We absolutely need to continue laboratory work unconstrained by typical timelines and budgets. I'm all for it. I'm all for a deeper understanding. We have much to learn and need to take the time to learn it, but the typical production constraints cause compromises ranging from unfortunate to extreme and defeating. I see too many projects that have no chance of benefitting anyone.

Traditional and simplistic approaches do concern me. Traditional approaches, in my view, just don't produce the attributes. They do sometimes, but not on a reliable or efficient basis. Simplistic approaches blithely ignore critical factors to dumb down and speed up design and development. *Anyone can do it. It takes only minutes.* Simple is good, but again, as Einstein said, "Everything should be made as simple as possible, but not simpler."

Both traditional and simplistic approaches are damaging, especially to the broad population of folks who know very little about human learning and instruction—much less than they think they know. By adhering to these approaches, however astutely, authors may feel they've done a good job; while in actuality, they've wasted much of their time, the learners' time, and perhaps a valuable opportunity for many. Our organizations can't afford this. Our learners can't afford this. Our reputations can't afford this.

So, Harold, you're right. We need to change it. Who is going to do this? Well, I hope, dear reader, "you and me."

SAM: Neither Traditional nor Simplistic

While the Successive Approximation Model (SAM) is neither a traditional instructional systems development approach such as ADDIE nor an overly simplified model such as those often advocated by "rapid e-learning" vendors, it incorporates insights of both. SAM also incorporates the thinking of contemporary design methodologies and development processes, such as Agile. Most importantly, SAM reliably leads to the best learning experiences possible within given constraints.

Let's talk briefly about constraints. Constraints always exist in production environments. Although they are easily seen as frustrating and the root of all problems and subsequent product inadequacies, the wise team embraces constraints. Studies of creativity have actually shown that artists flounder when there aren't any. Canvas size? Any. Placement? Somewhere. Theme? Whatever. Deadline? When you're done. *Whatever will I do?*

Constraints provide some of the needed criteria for success, and the lack of clear criteria makes success difficult to achieve. With constraints, we have at least part of the criteria and challenge defined. The important thing is to have appropriate constraints. Not (one would hope) simply criteria of accuracy, delivery date, and cost, but also of skills, attitude, and behavior achievement. The goal should be the application of those behaviors and the realization of the benefits of those behaviors. The challenge is never to produce a perfect learning product; it's to produce the best product possible within constraints.

We're talking pragmatism here. We really do want to exert the least effort necessary to create effective learning experiences. There's no need to make them fancier, more sophisticated, or more adaptive than is beneficial. However, there should be no satisfaction in creating a learning program within budget and other constraints that fails to produce the results needed. Better to cover less content, for example, and produce some of the needed skills, than to cover all of the content in superficial ways and produce no performance improvements.

So, how do we do all of this? How do we produce the most effective instruction possible within constraints and achieve performance goals? SAM is the best way I've found to do it.

After much experience with ADDIE—and even teaching it to many students and budding professionals—I came to realize it was too time-consuming, too focused on content instead of experience, and too unreliable. It was also devised before we had the prototyping and collaborative tools we have today. It was devised when lengthy instructional programs were the norm, well before we had the communication, distribution, and short attention spans that are prevalent today, and well before product markets could develop and close at breakneck speeds.

SAM is, more than anything else, quick and pragmatic. It depends on rapid experimentation to find the right solution and verify prospective designs before committing to them. It's easy to understand. Overall, it's just easier. Not easy. Easier.

Instructional design is always going to require careful thought. It requires good logic, imagination, and communication skills regardless of the design and development process used. However, unlike waterfall processes where design is done before implementation (a tenet increasingly disavowed by ADDIE advocates even though there was originally strong

insistence that design should be firmly in place before any development began), design is done in small steps, developed a bit, and then evaluated—often in context with real learners. Also, because it's done fast, several designs can be tested before settling on the final approach.

Practice Makes Perfect

Just as we know the importance of giving our learners sufficient practice, SAM teams need to practice as well. The principles are simple enough. I'm counting on our book, *Leaving ADDIE for SAM*, to convey them understandably. Note that nuances must be handled—there's no substitute for being in the moment, recalling relevant SAM concepts, applying them, and experiencing the results.

We hope this *Field Guide* will make that experience less frightening and more successful. As with riding a bike, once you can stop thinking about your balance, you can start developing some speed and think more about where you want to go. Once you've managed a Savvy Start, seen the advantage of iterations, discovered that your team is fixated on the learners' experience and the beneficial use of their time, you'll be on your way.

With best wishes for your success,

Michael Allen

PREFACE

Throughout more than 20 years of developing custom e-learning on an incredible array of topics for many of the most demanding organizations on the planet, we have continued to work toward an optimally effective process. Even 20 years ago, our process was based on many years of process research and development by our founder, Michael W. Allen. We know we will continue to find ways to improve it, but we share it confidently in the hopes that you'll find it beneficial. Our confidence is derived from two observations:

1. While quite independently developed and evolved, SAM shares many principals with successful Agile development for software engineering.
2. Our use of it has produced many award-winning projects and clients who attest to its superiority over other means that either they or their vendors have used.

The goal of this guide is to make your initial foray into successive approximations successful and as easy as possible. We admit, however, that the differences in SAM from many other processes can present some formidable challenges and surprises. It can be quite a new way of thinking. Therefore, we have attempted to provide you with some very concrete, practical, and specific resources and tools to help put into action the concepts you read about in *Leaving ADDIE for SAM*.

Leaving ADDIE for SAM is filled with checklists, questions, and strategies to help you implement this process. We have taken many of these resources, added some more, and put them into a format for everyday, real-world application.

This *Field Guide* offers an approach to support your effective execution of SAM. As you become more experienced with the events and strategies of SAM, you may find more productive approaches that better accommodate you and your organization's needs and expectations. However, the purposeful execution of the SAM components is critical, regardless of the approach you choose.

In this book, we have presented the entire SAM process in a series of events. While this *Field Guide* moves through the process in a chronological order, this should not be mistaken for a sequential process. SAM is fundamentally an iterative process, but your efforts need to be planned and managed nevertheless. Within SAM, you will iterate progressively toward the next major milestone. In some cases, you might return to a previous milestone, but you will always move forward to the successful completion of your project (see below for an overview of SAM).
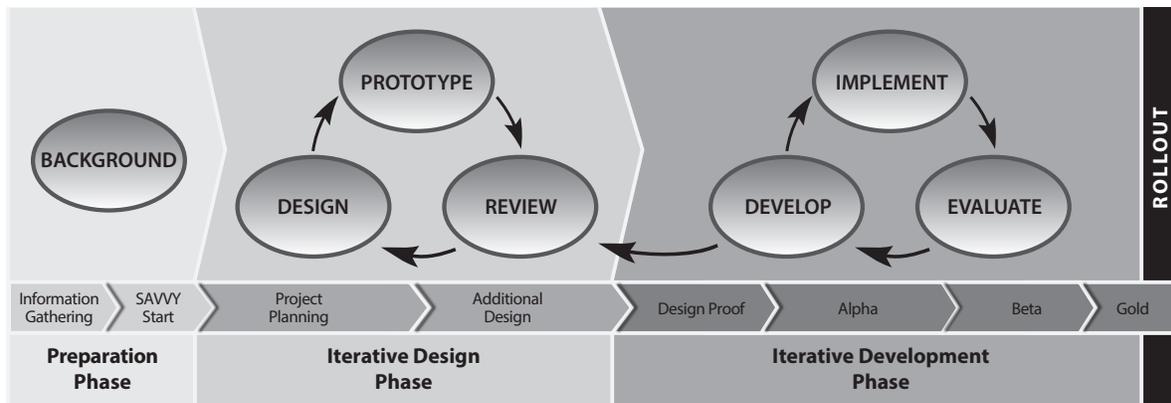
SAM is an effective process for the design and development of engaging learning events, whether they are comprised of e-learning, instructor-led training, or blended. The type of product you choose to create will determine how you execute SAM, so we have made every effort to highlight the challenges and opportunities for each type of instructional product at each stage of the process.

What This Guide Is Not

This *Field Guide* is a companion to *Leaving ADDIE for SAM*, not a replacement. We strongly recommend you read *Leaving ADDIE for SAM* (if you haven't already). While this *Field Guide* provides hands-on activities and strategies to support the effective use of SAM, it isn't intended to stand on its own and is not an abbreviated version of the foundational material in *Leaving ADDIE for SAM*. We have included key information and indicated where additional information can be found in *Leaving ADDIE for SAM*, but this *Field Guide* doesn't cover these topics in the detail necessary for full understanding.

Richard Sites and Angel Green