Working With Stakeholders and Clients

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Throughout your experiences as an instructional designer, you may form many different relationships with your colleagues. However, one of your most important relationships will be the one you have with your stakeholders or clients. It is important to recognize that the relationship with your stakeholders or clients is not solely based on transaction, but is also one of collaboration. In any instructional development process, there will be many different roles that each collaborator plays, as each brings a different set of expertise.

Remember, as an instructional designer, the communication style you choose to use will involve feedback from both parties. Your stakeholders or clients are looking to you for guidance in instructional design and content delivery. However, part of your work will be reliant on the content that your stakeholders or clients are giving you.

As instructional designers, we want to build trust with those we work with to better collaborate and deliver an end-product that meets the goals of a project. By building a stakeholder or client relationship, we can better understand who our target audience is, the project needs, and what our learning outcomes are.

For example, let's say you received a set of instructional materials on how to make toast. The instructional material provided may be simple to follow, but there may be details missing needed for you to start your work, such as knowing if your target audience has access to a toaster. This detail would be important in your design to ensure that learners have access to all of the materials needed to successfully complete the course. As we continue this chapter, think about what kind of details you would need to start a course development and write them down.

Throughout this chapter, we will be looking at different aspects of the client relationship, including the process, guidance and communication, scope of work, collaborative workspaces, challenges, ethical concerns, and reviewing content.

The Process

Every instructional design project should follow an instructional design model. The most familiar model is the ADDIE model. This model includes the following components: Analyze, Design, Develop, Implement, and Evaluate (Kurt, 2017).

Another popular model and the one we use at Colorado Community Colleges Online (CCCOnline) is the backward design model (Wiggins and McTighe, 1998). In this model, the focus is on the result of the instruction, while also asking what the students should be able to understand and do after the instruction has been provided. All instruction, learning activities, and assessments direct the students toward achieving the result.

Whether you are following the ADDIE model, the backward design model, or another process to design your instruction, it is important that your stakeholders understand your process and the reasons you are using that process. It's also important to be sure your stakeholders know what you expect of them as part of the process. Getting buy-in on your

process at the start will eliminate problems later. If the stakeholders understand what you expect, and the reasons for the expectations, they are better equipped to follow your procedures and processes.

There are different ways to ensure your stakeholders understand your process. One excellent option is to have initial meetings with all the stakeholders where you provide the stakeholders with information about the process and your expectations of each of them.

At CCCOnline, all of our stakeholders are required to take an orientation course that describes our processes and expectations. Once all stakeholders have completed the orientation, an initial vision meeting is held to discuss the scope of the project, to clarify the expectations from the stakeholder perspective, and to establish the duties and roles of all members of the team. After the vision meeting is completed, a kickoff meeting is held a couple of weeks later to review and finalize the project outline and scope, to set the timeline for the project, including deliverable due dates, review dates, and the final project deliverable due dates. The kickoff meeting is the beginning of the design phase of the project.

Guidance and Communication

Setting Communication Standards

As you work with your clients in your course development, you will want to ensure there is a standard of communication in place. A communication standard may include preferred methods of communication, frequency, and availability. By setting communication standards, you and your client can follow the expectations of each party in the development and promote a steady workflow. Remember that even though you are the instructional designer, your client is very much your partner throughout the development to ensure content validity and that the end product meets the needs of the target audience.

Becoming a Learning Coach

Your client will be looking at you for guidance in your expertise in instructional design. This expertise makes you what we will be calling a Learning Coach. A client may be an expert in their particular field, but may not have the same expertise with learning theories and applications to deliver their content to a mass audience. By understanding your role as not only the instructional designer, but as a Learning Coach to your clients, you are there to help guide your clients in their instruction development journey. Some clients may come to you with anxieties or questions like, "How do we engage the audience within different learning environments?" or "How do we measure the appropriate outcomes?". Your coaching is meant to put your client at ease. As you coach your client through their concerns, you may notice your client becoming more confident in what your instructional product will be and in turn providing content that is better suited for the learning environment. This mutual understanding can ensure success.

Flexibility

Always remember that your client is human. Much like you, certain circumstances in their lives may affect the delivery of content. We want to ensure that the proper expectations are set in place, but also be flexible enough to understand that certain circumstances may get in the way. By being flexible and empathetic, you ensure that neither you nor your clients lose motivation or energy throughout the development process.

Scope of Work

When beginning work on an instructional design project, it is important to ensure that all the stakeholders agree on the scope of work (SOW) for the project. The project scope determines the goals/objectives, deliverables, and deadlines of the project.

At the start of any project, define the goals and objectives so you understand what the stakeholders are expecting. We have included some templates that can aid in defining your goals and setting the scope of your project. These include a PreMeeting and vision Meeting Guide, a Vision Scope Template, a Kickoff Call script, and a Course Map (outline of the project).

In addition to the goals and objectives, determine what deliverables you will provide as part of the project. Will you be creating a large, full-scale curriculum project, with multiple courses, or are you developing a single course? You need to know what kinds of media you will be developing. Are you expected to create video or interactive content, or will you be developing more static content? If you are developing any multimedia, be sure to determine the length/amount of this content before beginning. The more multimedia and interactive content you will be developing, the more resources your project will take. You need to be in agreement with your stakeholders on all aspects related to the scope of the work before the start of the project.

Finally, you need to determine the timeline of the project. Decide upfront when each deliverable is due, how long the stakeholders have to review the content, and how long you will need to make any revisions requested by the stakeholders. Agreement on these issues avoids conflict later in the process.

In addition to having the scope clearly defined at the start of the project, it is important that you and the stakeholders have clearly defined expectations of all members of the team. Are the stakeholders expected to write content? Are they expected to review content, and if so, at what stages of the project? Some stakeholders may only be directly involved at the beginning and end of a design project, while others may be involved during the entire process. Be sure that each stakeholder, including you, understands the expectations of them during the development process.

A major reason for clearly defining the scope of the work and your expectations of the stakeholders is to help eliminate scope creep. Scope creep occurs when a part of the project takes longer or more work than originally determined. This usually happens when one of the stakeholders expects or asks for additional work beyond the original agreement or statement of work. The best way to avoid scope creep is to have clearly defined and agreed upon scope and expectations before the project starts.

Setting up a Collaborative Workspace

In this section, we will focus on collaborating with your design team and setting up a workspace that allows each member to contribute. Depending on your situation, a collaborative workspace can include both physical and virtual spaces. Setting up a collaborative workspace is key to ensuring that all stakeholders can contribute during the design process and questions about content can be addressed before developing course materials.

The first step to consider when setting up a collaborative workspace is the types of materials that will be delivered. If the instructor or subject matter expert you are working with is delivering large files, such as MP4 video files or large text files, then a cloud-based file hosting service like Dropbox, Microsoft's One Drive, or Google's G Drive may be a solution. File hosting services allow the user to upload large files and share the uploaded content with members in your organization.

Once you agree on a file hosting service, set up a folder, and share the folder with the stakeholders who will be delivering content. Make sure you provide the right type of access so that the stakeholders have permission to edit and add content.

In addition to setting up a file-sharing collaborative workspace, you should set a schedule for delivering content, and schedule regular meetings to check in with your stakeholders. Having a regular meeting scheduled can help prevent any communication issues or identify issues that come up as content is delivered.

Collaboration Tools

Tools for Meeting With Stakeholders

Web conferencing software – ex. Zoom, Skype

Tools for Project Planning

Spreadsheets, Shared Calendars – ex. MS Excel, Google Calendar

Tools for Content Delivery

Cloud-based services – ex. Dropbox, MS One Drive

Depending on your institution, a face-to-face meeting can be held at the start of the project and then transition to online meetings or conference calls. Meeting with all your stakeholders face-to-face at the beginning of course development can help determine which members of the development team are essential to future meetings and which content to assign for development to each member.

Challenges

Communication with stakeholders, as stated in our section on setting up a collaboration space, is key to ensuring completion of the course development on deadline. One common issue that occurs when developing online courses is lack of communication leading to confusion on how content is delivered, when content is to be delivered, and how content is reviewed for quality. For example, while working on a teacher education course last summer, I encountered an issue with the subject matter expert's schedule. At the initial meeting, the subject matter expert indicated she was familiar with the content from previously teaching the course and would have no issues making the content updates. However, the subject matter expert also indicated during the meeting that she would be on vacation abroad and would not be able to deliver content until after she returned. Since the subject matter expert indicated she was familiar with the content as an instructor, I recommended that she complete an initial review and submission of new content for the course's first two modules prior to going on vacation. Knowing that the subject matter expert would be unavailable during the first phase of development prompted me to update the content delivery schedule. Therefore, setting up expectations early on is essential to catching possible scheduling conflicts and avoiding confusion later in the content delivery stage of course development.

To avoid communication issues, also speak with your stakeholders regularly. We emphasize "speak," because long emails can lead to more confusion. Email communication is good for quick updates, but long emails chains can be more time consuming than simply talking on the phone for 5 minutes to clarify an issue. Therefore, set up a regular meeting time each week and check in with your stakeholders often by phone or web conference. After all the stakeholders are comfortable with the development process, you can hold meetings less frequently, but at the beginning stages of development avoid going more than a week between meetings.

Not communicating expectations early on with all of your stakeholders can lead to missed deadlines and content delivery falling behind schedule. Therefore, make deadlines clear and use a project plan to keep track of all the major milestones during the content delivery phase. If a deadline is missed, communicate with your stakeholders immediately and identify the issue that caused the delay. However, sometimes the stakeholder in charge of delivering the content may have fallen behind and need additional support to create the content. Courses that incorporate Open Educational Resources (OER) may be more challenging to develop content for and, therefore, may require more time. This is due to the "open" nature of OER content. While there are many free resources available to educators, not all OER content is high quality, or accessible.

Technical issues may also prevent the delivery of content; checking with your stakeholders when they miss deadlines can help identify if it is a technology issue or a content issue. Depending on the file-sharing system you selected, there may be issues updating content in the online workspace, and you may need to coach your stakeholders as to how to properly upload and share content with the design team.

When content is not delivered, and several deadlines are missed, set up a meeting with the key stakeholders, and develop a plan to get content delivery back on schedule. For this reason, it is often a good idea to set up a buffer between the end of content delivery and the start of the course launch. I typically set an early content delivery date of about 3 weeks before content is due for review.

Ethical Concerns

On some days during your course development cycle, you may feel like teacher dealing with a student. You know that the student is very skilled, but at times they may need your guidance. This is especially true when it comes to Ethical Concerns that might arise during the course development process. While a subject matter expert (SME) is exactly that, an expert in their chosen subject, they aren't expected to know everything. This means that, regardless of the type of development (OER or otherwise), your subject matter expert will be looking for outside sources to supplement their material.

Plagiarism

Although some might think of plagiarism as a concern reserved for students, it is a reality for the individuals creating the courses as well. Any time a subject matter expert looks for material, they run the risk of plagiarizing content. In most environments, this is very problematic. Many places will take ownership of a SME's work upon its completion; therefore, having plagiarized or stolen content can cause problems for that institution or place of business. Here a few strategies you can use when working with your SME:

1. When the content first comes in, be sure to read it thoroughly. Reading your content is the simplest way to tell if a SME has been plagiarizing. You should have a feeling for how a SME writes by now, from emails to course maps, so if anything in their content seems suspect to you, it might be time to raise a red flag and ask them about it, especially if they are missing citations for their material.
2. If you're able, run the content through a plagiarism checker, such as Turnitin, Quetext, or Prepostseo (those last two are free). Keep in mind that while the plagiarism checker will give you a better idea of where an SME's content came from, it doesn't necessarily mean plagiarism has taken place.
3. As you read over the content and suspect plagiarism in a particular passage, highlight it, and paste the suspected content into a Google search. Believe it or not, the search results that come back may be bolded portions of a website where the content is from. If it is, you need to discuss this with your SME.

Catching plagiarism early is vital. SMEs may not be aware that what they're doing is plagiarism and may continue to do it throughout the process. It might be helpful to discuss Creative Commons licenses with them to elucidate what they can and cannot do. Reading through a basic overview of the licenses (https://edtechbooks.org/-JMt) might save you from future issues.

Conflict

Unfortunately, sometimes, conflicts between you and your SME arise. Remember that during development, communication is key. More often than not, SMEs are happy to dispense their knowledge, but they also must be heard. They are not a tool to be used and discarded. Keep this in mind to save your developments from falling apart. Here is one example:

During the development of a course, the SME, who was writing an entire OER eBook, decided that she wanted links to the eBook placed in every page of the course so students could readily access it everywhere. While I immediately

disagreed with her, I allowed her to finish her reasoning. Once she concluded, I explained that from a design perspective, this could cause confusion for students, regardless of her good intentions. I told her I appreciated her input and told her that if she disagreed, we could have a meeting involving the dean (her boss) and we could talk things out with him. She decided to do so, we talked it out and we came to an agreement: the links to the eBook would be placed in only the most relevant and useful places. We both walked away from the conflict satisfied with our agreement.

Reviewing the Content

Quality Assurance

We all want our students to have the best quality courses. One of the most important components of a course development comes during the quality assurance (QA) check. Whether you as the ID do it alone or you're lucky to have someone there to help you with it, quality assurance is paramount. CCCOnline implements QA via a two-fold approach: we have a designated QA person checking the course throughout the entirety of the build. When the content first comes in, they go over all the essential components thoroughly and write feedback and recommendations. Then, once the course is in place in the LMS, they review it again. Throughout the entire process, the QA person is viewing the course as a student would and ensuring everything makes sense. As Instructional Designers, we should never forget the end user: our students.

Approval

Not only should a QA person sign off on the content, but the SME and the program leader(s) should also have a say in approving the content. Essentially, when the content is in, and before it is placed in the LMS all parties should have their voices heard:

1. The QA person should be viewing the course from the student's perspective, giving valuable insight that might go unnoticed otherwise.
2. The SME and program leader(s) should have the best understanding of the content and should, therefore, ensure the course aligns with all objectives and hits all of its necessary deliverables.
3. As the ID, you must do some of both: ensure the content aligns with the outcomes that have been set and ensure the course will make sense from a student perspective.

Conclusion

In this chapter we discussed some strategies for collaborating with various stakeholders during a course development and provided some recommendations for solving some common issues instructional designers encounter during the collaboration phase. As the instructional designer, having a well-developed project plan, that includes deadlines for content delivery and dates for meetings with stakeholders, is essential for a successful course development. Therefore, when developing your project plan remember some of the issues we presented here and the types of challenges your stakeholders may encounter during content delivery. What can you do as the instructional designer to help your stakeholders meet the deadlines? Consider the following:

1. What type of content are your stakeholders expected to deliver?
2. When is the course expected to launch? Consider potential time constraints for stakeholders.
3. How much time will the quality assurance process take?
4. Will stakeholders be asked to review content on multiple occasions? How will reviews and feedback be managed?

Templates

- [Kickoff Call Script](#)
- [Pre-Meeting and Vision Meeting Guide](#)
- [Vision Scope Template](#)
- [Course Map (.xlsx)](#)

References

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