

PROCESS MODEL 01 - THE CLASSIC

ADDIE at a Glance — Where the Frameworks from Card 1 Live



★ = Frameworks from Card 1 apply here · **Rule:** Design phase is where alignment is built — Mager + Bloom's + Gagné all happen before a single screen is built.

PROCESS MODEL 02 - THE AGILE ALTERNATIVE

SAM (Successive Approximation Model)



Use ADDIE when...

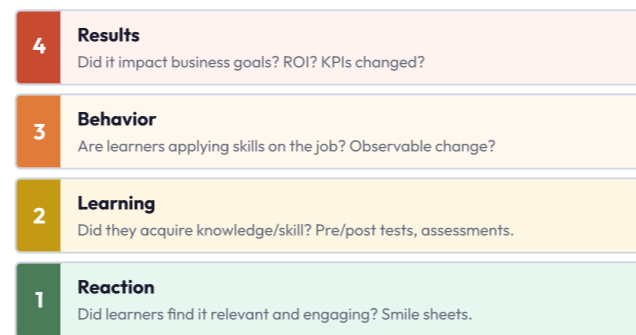
Scope is fixed · Large team · Compliance/regulated · Waterfall client · Long timeline

Use SAM when...

Scope may shift · Agile org · SaaS user education · Rapid iteration needed

EVALUATION FRAMEWORK

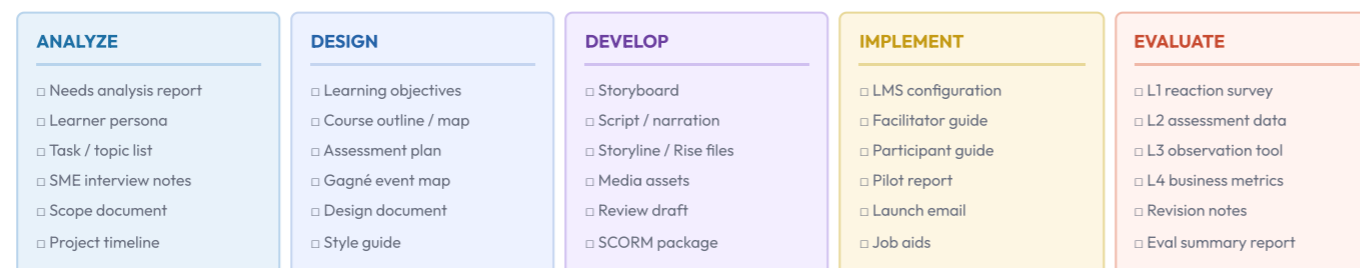
Kirkpatrick's Four Levels of Evaluation



⚠ **Most IDs stop at L1-L2.** Push for L3 data (manager observation, performance metrics) to prove business value.

OUTPUT GUIDE

Key Deliverables by ADDIE Phase



STAKEHOLDER MANAGEMENT

Who Needs What & When

SME	Design phase	Content accuracy review · task list validation · source materials
Sponsor	Analyze + Eval	Scope sign-off · business goals · L3/L4 results reporting
Manager	Implement + Eval	Pilot feedback · L3 on-job observation · reinforcement plan
IT / LMS	Develop + Impl	SCORM version · completion rules · accessibility requirements
Learner	Analyze phase	Needs interview · persona data · pilot group · L1 survey

Tip: Get SME sign-off on objectives *before* development. Changes after storyboard = expensive.

PROJECT MANAGEMENT

Scope Creep & Common ID Risks



No signed-off objectives

SME keeps adding content mid-development

→ **Get written approval on objectives before storyboard**



Missing SME availability

Reviews drag timelines by weeks

→ **Book review windows in calendar at project kickoff**



Confusing training with performance support

Sometimes a job aid solves it — not a course

→ **Ask: "Is this a knowledge gap or a process gap?"**



No evaluation plan

Can't prove ROI or justify the ID team's existence

→ **Define L1-L3 measures before development starts**

PRACTITIONER REFERENCE

ID Toolkit by ADDIE Phase

ANALYZE

SME Interviews Surveys / SurveyMonkey Task Analysis Template Cathy Moore Action Map FrontEnd Analysis Learner Persona Canvas Miro / FigJam

DESIGN

Mager Objective Builder Bloom's Verb Wheel Gagné Event Map Alignment Matrix (Card 1) Course Outline Template Storyboard Template Design Document

DEVELOP

Articulate Storyline 360 Articulate Rise Canva / Adobe Express Vyond / Powtoon Camtasia / Loom AI Tools (Claude, Copilot) SME Review Tracker

IMPLEMENT

LMS (Moodle / Cornerstone / Docebo) SCORM / xAPI / AICC Facilitator Guide Template Pilot Feedback Form Accessibility Checker (WAVE)

EVALUATE

Kirkpatrick L1-L4 Framework Phillips ROI Model LMS Reporting / Analytics Google Forms / Typeform Pre/Post Test Design Observation Checklist

ADDIE (Branch, 2009) · SAM (Allen, 2012) · Kirkpatrick (1959) · Cathy Moore Action Mapping (2012)

Pair with Card 1 · Frameworks Reference