

Analysis Report Worksheet – Design Document

Team: Corporate - Tony Johnson, Amy Kidder, Lucy Roca, Pam Tink
Course: 5211 Instructional Design II
Topic: Developing Effective Learning Leaders
Client Company: Concentra
Client: Amy Barbour – Sr. Director of Learning at Concentra

1. Topic, Audience, Purpose:

Topic

“Developing Effective Learning Leaders” is an 8-week, blended course for a new learning leader at Concentra. It is important that leaders within the learning organization not only develop colleagues and learn the business, but that they produce a strategy for their team in the first 8 weeks of onboarding.

Audience

The audience for this course is any new learning team leader (manager and director level) at Concentra. The leaders could be promoted internally or join the team from outside the organization. They will all possess expertise in their specific learning discipline.

Purpose

The purpose of this course is for a new learning leader at Concentra to build strategic relationships within the company, get a basic understanding of Concentra’s services and products, and represent the mission and vision of the Learning Department to leaders throughout the organization. The course will explore Concentra’s services and products, culture, and elements of leadership development, while building strategic relationships within the organization. By the end of the course, the learner should be able to create and present their team-specific, 2-year strategy and overall course reflections in a formal setting.

2. Learning/Learner Needs

Learner Needs

The learner will create a strategic plan to build relationships within the company and to understand the Concentra business, culture, and leadership philosophy. The learner will need to ultimately create a 2-year strategy for their team.

Needs include:

- The learner will need to build key relationships within the learning team.
- The learner will need to build key relationships with leaders throughout the organization.

- The learner will need to articulate Concentra’s strategy, culture, and business.
- The learner will need to identify leadership best practices to assist with overall strategy.
- The learner will need to create and present the 2-year strategy for their team.
- The learner will need to debrief with the leader weekly.

Client Needs

The client needs a new learning leader to successfully onboard with the learning team, understand the Concentra business, culture, and leadership philosophy, and produce a 2-year strategy in their first 8-weeks in the department.

Needs include:

- The leader will have resources to support the new hire throughout learning plan such as an instructor guide that outlines their responsibilities before, during and after the course.
- The leader will need to have a participant guide for the new hire.
- The leader will know who and when to set up strategic meetings with before the new hire starts.
- The leader will debrief and provide feedback to the learner on leadership best practices.
- The leader will debrief and provide feedback to the learner on their 2-year strategy.

3. Learning Expectations

The expectation is that the new learning leader at Concentra will gain a foundational understanding of Concentra’s strategy, culture, products, leadership, and services. They will also build strategic relationships with leadership in the company and the learning team and be able to formulate a 2-year strategy for their learning discipline. The leader should have experience in managing employees and expertise within their learning discipline. The client expects the importance of the new leader being out in the Medical Centers learning about the center products and services, joining sales calls to better understand our customer’s needs, and in the Corporate office building strategic relationship with other leaders and the learning team.

An overview of the existing skills, knowledge, and limitations of your audience

Although the new leaders will have experience and knowledge in their specific discipline (in which they will be managing) they will lack the requisite company knowledge and relationships. They should also have prior leadership experience. The limitations of the new hire will be determined by whether they are an internal or external candidate and the knowledge gap they have on the company and relationships within the organization.

4. Course/Lesson Goals and Objectives

G1 Create a 2-year strategy for the leaders learning discipline.

- O1.1 Discuss Concentra’s strategy (cognitive)
- O1.2 Recognize Concentra’s services and products (cognitive)

- O1.3 Explain Concentra's support functions (cognitive)
- O1.4 Summarize the goals of the learning team – mission, vision, learning methodology approach (cognitive)
- O1.5 Develop a deeper understanding of the learning teams people, processes, and purpose (affective)
- O1.6 Discover the learning team clients' perceptions via constructive feedback (affective)
- O1.7 Recognize leadership best practices and identify gaps (cognitive)
- O1.8 Create the team's learning strategy (cognitive)
- O1.9 Demonstrate leadership and knowledge of the company, culture, and team strategy via a formal presentation (psychomotor)

G2 Develop relationships within the organization to build confidence of the learning team enterprise-wide, while recognizing leadership and culture opportunities in the organization.

- O2.1 Identify Concentra's Orange Book values (cognitive)
- O2.2 Develop relationships with Concentra leaders to build credibility (affective)
- O2.3 Recognize Orange Book behaviors demonstrated by colleagues in the centers (cognitive)
- O2.4 Creates strategic relationships within the learning organization to understand culture (affective)
- O2.5 Creates meaningful relationships with direct reports to develop trust (affective)
- O2.6 Identify best practices when working with clients and stakeholders to build confidence (cognitive)
- O2.7 Summarize Orange Book and leadership behaviors demonstrated by Concentra colleagues through relationship building (cognitive)

5. Learning Activities

The learning activities will be created to meet the different learning objectives throughout the course. The activities will contain debriefs with the leader to make sure expectations were met. All activities will build upon each other to create the 2-year strategy which is the final activity.

Activity 1: Leadership

The learner will read 2 chapters of *The Leadership Challenge* every week and debrief with the leader. The debrief will include questions around what they've learned, where they can apply what they've learned, and where they recognize those behaviors at the company. There will be a component of leadership learnings that will need to be applied in the overall strategy.

Activity 2: Culture – Orange Book

The learner will read The Orange book and debrief with the leader on what The Orange book means. They will have weekly activities where they answer questions on Orange Book behaviors they have recognized throughout their meetings with the leaders, centers, and the learning team. There will be a component of Orange Book learnings that will need to be applied in the overall strategy.

Activity 3: Center Visit

The learner will immerse in a Concentra center for 3 days to learn Concentra's services and products. They will observe and shadow different areas and roles within the centers. These will include front office, back office and therapy areas of the center. They will meet with the Center Operations Director, front office colleagues, medical assistants, Center Medical Director and Physical Therapist within the center to learn the what, why and how of what they do. They will debrief with the leader at the end of their center visit week to discuss learnings. There will be a component of center visit learnings that will need to be applied in the overall strategy.

Activity 4: Sales ride-along

The learner will spend a day with an Account Executive visiting different clients in their market. They will learn the overall sales process, along with a "day in the life" of sales at Concentra and learn about the different industries that we work with along with the customer needs and expectations of our products and services. The learner will debrief with the leader at the end of their sales ride along to discuss learnings. There will be a component of sales process learnings that will need to be applied in the overall strategy.

Activity 5: Create Strategy

Throughout each week, the learner will be building on activities and forming relationships that will help prepare them to create their final 2-year strategy. The learner will ultimately create their 2-year strategy for the team based on knowledge gained throughout the course, and formally present to leadership. Each week there will be a small activity around the strategy to help them build their overall strategy along the way. To do this, the learner will have various activities where they will build key relationships with leaders in Concentra's organization while learning the company strategy, culture, and leadership development. They will meet with Concentra's center support functions to gain an overall understanding of the Concentra ecosystem. They will meet and form relationships with the different disciplines of the learning department to gain an understanding of the team culture, people, processes and purpose. To gain valuable feedback on the team, they will meet with their team's clients to discuss what they are doing well, and areas for opportunity.

6. Technology & Staff Requirements):

TECHNOLOGY AND STAFF REQUIREMENTS

Client/Facilitator – Amy Barbour

- The client will set expectations upon new hire of the overall course requirements.
- Provide the learner their laptop and access to all systems.
- Set up strategic meetings (including center visits and sales ride-alongs) before the new hire starts.
- Debrief and provide feedback weekly with the learner on activities.

- Debrief and provide feedback to the learner on their 2-year strategy.

A description of media used in the course

The media used in this course includes the leader providing the new leader a laptop, access to the internet, and all associated passwords to relevant Concentra proprietary systems upon new hire. The course will be loaded on the Canvas platform. All lessons, resources and activities will be provided within the course content. The Concentra Orange Book and leadership book “Leadership Challenge”, by James M. Kouzes and Barry Posner, will be provided by the instructor. The learners will take notes via their laptop and submit as assignments within the Canvas platform. The final presentation will need to be in a formal setting with laptop, projector, and screen in a conference room setting.

List any environmental resources available to you

This course will be implemented in Concentra’s corporate office and various Concentra Medical Centers. The instructor needs to secure the conference rooms, offices and locations the learner will need to meet with their stakeholders. They will also need to secure a projector, laptop, handouts, and screen as needed for presentations by either party. The instructor will also have access to printers for any instruction materials or resources. The learner and instructor will have access to the company Intranet and online resources. The Concentra facilities also have wi-fi for the learner as needed.

List of environmental resources:

- Laptop
- Canvas platform
- Handouts
- Conference room, offices, meeting rooms
- Projector
- Projection screen
- Printer
- Paper
- Wi-fi
- Intranet/Internet

7. Assessment

The learner will also be assessed weekly on timely scorecard completion of all activities. The leader will review the scorecard and make sure it’s completed before the learner can move onto the next week. For the final project, the learner will be assessed on whether or not they are able to apply their knowledge to create a 2-year strategy framework for their team. They will need to demonstrate what they’ve learned in their final presentation and be assessed by their leader through observation with a formalized checklist of criteria (scorecard). The criteria will be selected on various components that will need to be included in the overall strategy plan.

8. Evaluation

The learner will be evaluated with a Level 1 and Level 3 survey. The survey results will be reviewed quarterly for feedback and considered for course improvement. The client will assess all feedback and make updates to the course on a maintenance schedule. Course maintenance will be done annually based on both Level 1 and 3 results. The scorecard will also be considered and evaluated based on the timing and completion of assignments. Learner evaluation scores and comments before the course changes will be compared to the learner evaluation scores and comments after the course changes are implemented.

Level 1:

The Level 1 evaluation questions will come from the client. The company uses the following questions for all courses:

On a scale of 1-5, with 5 being the highest:

- Importance of the course to their roles and responsibilities.
- Quality of instructional design.
- Quantity of information for the learner to perform their daily job function.
- Impact on providing perfect service.
- Learning contribution to the value of the patient and customer experience.
- Intent to apply to their daily job.

Level 3:

The learner will be assessed through a Level 3 evaluation (behavior) on whether or not they were able to apply what they've learned. The Level 3 evaluation will be filled out from a combination of both management observation, and stakeholders involved in their learning process. The stakeholders/manager will fill out a formal evaluation on whether or not the new leader applied their learning, and the learner will fill one out on how well they felt they were able to apply their learning. This survey will reflect questions around how well the learner applied their knowledge of Concentra's products, services, culture and leadership beliefs. The questions will also evaluate the application around knowledge of the learning team's peoples, processes, and purpose.

9. Timeline

Project:

The client has agreed to meet our course due dates for the class, as this course will not be needed until late May. These are estimated dates since we don't have visibility to future deliverables for this class.

Needs Analysis: February 18th
Design: March 11th
Development: April 27th
Implementation: Ready for new hires on May 7th

Course:

The course will take a total of 8 weeks and will be implemented via the Canvas platform. The learner will complete all objectives and activities during each week of the course, and then debrief with their leader at the end of each week. On the 8th week the learner will present the 2-strategy on their team.