Quality Management

in Learning and Development

HADIYA NURIDDIN

More Praise for *Quality Management in Learning and Development*

"If your approach to quality assurance is a checklist at the end of your course, it's time to pick up a copy of this book and rethink your strategy. Hadiya will guide you through a tactical approach to ensuring quality in your training with a thoughtful process and practical examples."

—Sarah Mercier, CEO, Build Capable

"Hadiya Nuriddin has written a must-read primer that proves why an L&D team cannot survive (let alone succeed) without an informed process in place to identify and address mistakes. Through industry insights (and an engaging case study providing a solid example throughout), this book walks you through defining, planning for, assuring, and controlling quality in your learning programs—a surefire way to increase the value of the L&D function in the eyes of business leaders, stakeholders, and learners."

—Karin Rex, Chief Geek, Geeky Girl

"This is a must read for all organizations that care about delivering quality content to their learners. Hadiya, always a storyteller, makes an otherwise mundane task like quality management interesting and insightful."

—Daniel Keckan, CEO, Cinécraft Productions

"*Quality Management in Learning and Development* is a comprehensive toolkit for excelling in the e-learning sphere. Hadiya has brilliantly bridged the gap between theory and practice by providing actionable steps for quality improvement!"

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"*Quality Management in Learning and Development* profoundly addresses the central aspects of quality management with an eloquent balance of rigor, scope, and tangible cases. It will challenge you to rethink your quality management practices, inspire you to improve upon them, and provide you with a practical road map for you and your team to co-create a shared meaning, mission, and approach to integrating a quality management system into your workflows."

—Kristin Torrence, Head of Learning Engineering, Talespin

"This book came at the perfect time, aligning seamlessly with my team's current initiative to enhance our quality management system. The inclusion of a detailed case study not only grounds the theoretical concepts in a practical application but also provides a clear, step-by-step blueprint that illuminates the path to an optimized and effective quality management system."

—Tabatha Dragonberry, Senior Instructional Designer, USAA

"As an L&D professional, you understand the value of quality products, but Hadiya immediately gets you thinking about a holistic quality-first mindset. With evidence-based research, *Quality Management in Learning and Development* takes you on a journey that covers the entire spectrum from policy to procedures, strategies, and production. This book is the one you didn't know you needed."

—Kevin Thorn, EdD, Director of Development, Artisan Learning

"Looking to move away from endless review cycles, inconsistent learning design, and haphazard quality processes? L&D managers, senior IDs, and anyone working to improve the training their team creates will benefit from following this systematic, sustainable, and proactive approach to quality management."

—Christy Tucker, Learning Experience Design Consultant, Syniad Learning

"Hadiya offers an essential and accessible guide for any learning professional committed to ensuring quality in the development of learning experiences. I'm now excited to further define my team's quality management system—something I never thought I would say!"

—Meg Bertapelle, Senior Instructional Designer

"Hadiya's writing drew me in immediately. Her engaging real-life experiences mirrored many of the same work situations I've faced. Pairing her art of storytelling with the underlying principles behind quality management, she makes the topic approachable for anyone in L&D. Plus, as a reader, you are left with practical tips, guides, and worksheets you can immediately apply in your workplace to create your own quality management system."

—Tracy Parish, Instructional Designer and Consultant, Parish Creative Solutions

"Never before has there been such solid attention on quality management in L&D until now. Hadiya's perspective on this matter is what generations of learning professionals will reverently refer to as the cornerstone of their practice."

—Tameka J. Harris, Pro Learning Design Strategist, IDSuccess Design Studio

"It's one thing to design a great learning solution—but without a focus on quality, what you produce may fall flat. Hadiya lays out specific tactics you can apply to your learning projects from day one to ensure quality across all layers of the experience and process. This book is a must have on any L&D professional's reading list!"

—Cammy Bean, Senior Solutions Consultant, Kineo; Author, *The Accidental Instructional Designer*

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Contents

Introduction v

Chapter 1. Introduction to Quality Management 1

Chapter 2. Overview of Quality Management Systems 15

Chapter 3. The Role of Quality Management in L&D 29

Chapter 4. Defining Quality for Your Team 43

Chapter 5. Planning for Quality Management 59

Chapter 6. Assuring Quality 83

Chapter 7. Controlling Quality 115

Chapter 8. Reviewing for Compliance 133

Chapter 9. Questions From the Field 155

Acknowledgments 167

Appendix 169

References 181

Index 183

About the Author 189

About ATD 191

Introduction

I was introduced to learning and development (L&D) during my first corporate job working as a technical support representative for a software company. It had no training department, so the senior product representatives provided weekly lectures on the products we supported. However, very little training was provided to support the software in which the product resided, a confusing decision given that the technical support team routinely hired people with no technical expertise. Our technical training consisted of senior team members telling us what to do, listening in on our calls while we did it, and giving us feedback on how well it was done. Most of us learned our jobs eventually, but it was a slow and frustrating process for both the technical support representative and the customer.

Once I became a senior employee, I decided we could do better for our team and customers. I created a comprehensive curriculum that included courses on Microsoft Windows 3.1 and software troubleshooting strategies. How could I suddenly create effective training with no models or guidance? I couldn't. How do I know? Well, while delivering the course on Microsoft Windows, I fell asleep. Yes, I fell asleep while I was talking. While I could have fallen asleep for various reasons, and the course may have been effective if I had remained conscious long enough to deliver it, I suspect that's when I learned that training was more than talking.

I created technical support training by copying what I had seen before and filling in the blanks with guesses. For years after formally becoming an instructional designer, I was still guessing. Even after completing degrees and certifications in learning and development, each new job seemed to require more guessing about what my manager, clients, and team members wanted. I soon accepted that learning design is treated more as an art than the science it is, so individual people are free to decide how to best support learning. This inconsistency across industries, companies, teams, and people is frustrating, and makes me question what

professionalization means in learning and development. It also compromises quality, which depends on a consistent, specific definition that describes expectations.

It's not that quality is being ignored in learning and development. That's impossible. As I'll mention throughout this book, an L&D team can't survive without some process for identifying and addressing mistakes. The challenge is that when discussing quality for L&D, the conversation often drifts to typos, grammatical errors, and broken links, and then stays there. In my experience, teams focus quality efforts on the post-production hunt for errors and call it *quality control* or just *review*. And this work is important. I used to say that one way to find a typo in a participant guide is to print 100 copies, open one, and flip to any page. That random page you wrote and rewrote will inevitably contain an overlooked typo that jumps off the page directly into the pit of your stomach. It's happened to me more times than I'd like to admit. What follows may be a series of calculations weighing the typo's severity against the odds of people discovering it. Perhaps you consider rewriting and reprinting the document or just confessing to the class that there may be typos and asking for forgiveness in advance.

A typo, whether minor or major, is still an error that can negatively influence your learning experience's quality. All errors have consequences, but the severity depends on the impact. Broken hyperlinks or slides with buttons leading nowhere can compromise organizational outcomes if learners can't complete e-learning courses. Unexpected silent or blank screens due to temporarily hidden text, images, or audio that were not caught before publication and distribution can cause frustration and disengagement when learners encounter them in the learning experience. Courses not adhering to accessibility standards can exclude learners from the experience entirely.

And, most egregious, learning programs that do not meet their objectives and have little impact can diminish the value of the L&D function within the eyes of business leaders, stakeholders, and learners.

The Value of Quality Management

Before you begin the journey into quality management, there's a question you need to answer for yourself and, ultimately, your organization: What's at stake? As you build your quality management system, regardless of complexity level, some will ask whether this is overkill. Like someone said to me once, "If there's a typo, fix it." The implication is that there's no need to go through the process of building

a system just to insert a comma where needed. Is this really that important? In some cases, the naysayers may be correct.

You do not want to build a solution in search of a problem. The point of this exercise is not to have a quality management system. It's to address the current practices that reduce quality, slow production, and increase costs. Quality management is only one comprehensive way of taking control of your production process. So, the question of value is answered by understanding how much risk the L&D function takes on by maintaining the status quo. Again, for some teams, the risks are minimal, or the systems you're using now are enough. For other teams, they already know that the weight of the risk is enormous. However, the teams with the most significant challenge are the ones that have no idea what the issues are and what their presence is costing them.

While cosmetic and technical errors can usually be fixed when they're identified, ineffectiveness is often more challenging to address without a system. About five years into my instructional design career, I designed and developed a payroll course that was part of an organization-wide human resources software rollout. The consultants gave me the instructions and access to a dummy version of the software. With very little oversight, I did what I thought was best. I wrote down the instructions, and then told them to the participants during the training while they followed along. We all relied on me knowing what I was doing, simply because of my title and department. This was payroll training! The gravity of the situation didn't hit me until years later. I rarely get news that my training wasn't effective, but this was an exception. I found out that they believed the manual I created was unusable and subsequently created their own. I shudder to imagine what led to the moment when they decided enough was enough.

Developing the training and accompanying materials for that payroll module had far-reaching consequences. Some could argue, "Well, Hadiya. Perhaps you were just bad at your job, too new to understand what you were doing, or poorly managed." While those are all plausible reasons for the breakdown, they aren't specific enough to do anything about them. We should know exactly what happened, what was expected of everyone involved, and where the breakdown occurred. Without processes in place, it's difficult to pinpoint problems and address them. Quality management is one of those systems that can help reveal what lies beneath the work we do every day.

Quality issues are typically symptoms of larger problems triggered and proliferated by how teams are staffed, managed, and supported. For example, the quality issues plaguing some of our learning experiences are caused by a lack of evidence-based, documented, and consistently applied standards. During the decades I've worked in learning and development, the solution to addressing quality was constantly reviewing our work. Quality management consisted solely of fixing the errors reviewers, approvers, subject matter experts (SMEs), and ultimately, learners found. Some may consider this seemingly never-ending cycle of checking-and-redoing effective. After all, you will inevitably create a course with fewer errors than you would have without this process. However, conducting quality management this way is also inefficient, expensive, and often demoralizing.

It's time for all L&D teams to formally embrace quality management as an essential part of the learning experience design function. The American Society for Quality (ASQ) defines *quality management* as "all activities of the overall management function that determine the quality policy, objectives, and responsibilities, and the implementation of these by means such as quality planning, quality control, quality assurance, and quality improvement within the quality system" (Duffy and Furterer 2020). This requires shifting to a quality-first mentality and building, implementing, and supporting all the processes and procedures necessary to support that vision.

While the actual value of quality management is a data-driven decision, there is something even more significant to consider. When it's late in the day and an e-learning developer is completing the final version of a module on customer service, it's easy to see that as the end when you reflect on the module's journey. But it's only the beginning—the module should shift or support a specific set of behaviors at the site. And there are consequences depending on whether or not the shift happens.When retail associates engage with that module, they won't know if the SME commandeered the design process or the timeline was cut by a week. They just know that the module came from the training department. That's all leadership sees too. So, if the shift in behavior does not occur, the fault, right or wrong, falls on us.

The customer knows even less. All they see is a cashier, Todd, at a register; whether he follows the protocol he learned from the training module will heavily influence the customer experience. And, of course, it determines whether that customer returns and how they will talk about their time with Todd. That customer's experience will influence the retail organization's bottom line.

A process with that significant of an impact deserves its own support. It deserves its own quality standard, guidelines, and processes that can be reviewed, modified, and updated. Many times, I had to build training for other departments for processes that were not documented. I once worked with a global advertising company to implement new software that would affect one specific team's work. Nothing was documented, and everyone on the team was doing the job differently. Consequently, the company wanted to use the learning design process to figure out the current processes for the job and then teach people how to do the job using the new software. I was shocked that, in such a large company, no one seemed to know what an entire team was doing, that there was no consistency, and that nothing was documented. Yet, many of us in L&D work under the same circumstances while simultaneously "process shaming" other organizations for doing the same.

Who Is This Book For?

I've had the opportunity to experience quality management from different perspectives. As an instructional designer and developer, it was my job to ensure my materials were perfect. As a manager, I tried to provide the support my team needed to ensure the materials they created were perfect. As an instructional design instructor, I reinforced the idea that the responsibility fell on the instructional designer's shoulders to ensure everything they created was perfect. And as a freelance consultant, it fell on me to ensure that all my materials were, again, perfect.

I was never told, and I never asked or considered what, beyond accuracy, *perfect* meant. I also never questioned whose responsibility it was to reach this mythical peak. Consequently, there was no clear plan to get there. The truth is that in all the different roles I played, it was my responsibility, but also everyone else's. Quality is not just about what you produce—it's about who you are as part of a learning organization because the quest for quality should influence every decision. Your team's commitment to quality reflects your commitment to your learners. Your commitment to your learners reflects your commitment to the organization's success. And your commitment to the organization is why your team exists.

Ultimately, this book is for everyone in learning and development because we all play a role in shaping the learner experience. But it's primarily for the person tasked with building or reinforcing the bridge to quality management. This person could be at any level and hold any internal or external L&D role. It's for the senior

instructional designer looking for ways to reduce the amount of revisions that need to be done. It's for the new instructional designer who wants to understand what standard they will, or should be, held to. It's for the learning management system administrator who wants to reduce the frequency of uploading revised courses. It's for freelancers who want to provide their clients with a better experience when reviewing materials. Finally, it's for the L&D manager who wants to demonstrate their team's commitment to the organization's health.

However, while anyone at any level can lead and champion the creation of a quality management system, this book will stress the importance of senior management input and support. According to ASQ, "An essential first step in getting started on process improvement is when senior management makes it a strategic organizational goal. The importance of process improvement must be communicated from the top. Leaders need to foster an organizational environment in which process improvement can thrive and people are regularly using techniques and tools related to quality improvement" (Duffy and Furterer 2020). In other words, while this effort can be built from the bottom up, it must be sustained from the top down.

Note that this book focuses on quality for learning materials developed for adult learners in the business sector, including corporations, nonprofit organizations, and associations. While this definition does not include materials created for K–12 or higher education, teams that create professional development opportunities for staff and faculty can also benefit from the methods explored here.

What's in This Book?

The goal of this book is not to simply develop and implement a quality management system, but to use its guidance to learn more about how the learning experiences your team produces support your organization and how well-supported your team is when doing so. Ideally, this journey of discovery will unearth new or improved strategies for meeting the team's collective vision of quality. Developing and implementing a quality management system is just one way to meet that challenge.

Chapter 1 provides a brief history of quality management and an overview of quality as a term, concept, and discipline. In addition, I'll explore the benefits of implementing quality management systems or formalizing the systems you already have.

Chapter 2 explores the components of a quality management system and the role of each process. It's a level- and expectation-setting exercise about process inputs and outputs, what's expected of whom, and what outcomes you, your team, and your organization can anticipate.

In chapter 3, I transition from discussing quality in the abstract to looking at it through the lens of learning and development. I'll consider what quality management looks like in L&D and how to prepare to begin the journey. I'll also introduce a case study featuring an L&D manager that I'll use to provide background for the examples that appear throughout the book.

In chapter 4, I'll explore strategies for identifying what quality means for you and your team. This exercise includes gaining a clear understanding of the current state of your work and where you ultimately want to be. Ideally, you'll develop goals or a mission statement that supports your team's philosophy about the value it adds to improving performance at your organization.

Chapter 5 focuses on planning for quality. Once you have your mission and goals, you will enter the planning phase and develop a project plan and team to move forward. Developing a quality management system is a challenging process best navigated by teams that are equally committed and understand what lies ahead.

Chapter 6 focuses on defining a standard and its role in quality management. I'll review other standards from related industries that you can use to inform your own standard. Then, I'll discuss how to develop guidelines that support the standard. I'll explore how to find existing guidelines and create and structure new ones.

Many associate quality control with a checklist designed to help reviewers identify postproduction errors. However, it's difficult to control quality after a product has been created. Quality control happens during course creation, not after—it's the policies and procedures created to support the guidelines designers and developers should follow. In chapter 7, you'll learn how to create the policies and procedures needed to support compliance.

Quality review is a more appropriate name for postdevelopment reviews. Chapter 8 will explore strategies for creating an effective and sustainable review process.

Chapter 9 is devoted to reviewing answers to frequently asked questions about developing, customizing, adapting, and maintaining a quality management system.

Finally, the appendix includes templates and tools you can use as you build and support your quality management system.

Throughout the book, you'll also find some additional notes and tips. The notes provide some extra information about the section they appear in, and the tips offer some best practices for you to implement in your team.

Ready to get started? As you'll soon learn, commitment is the first step on this journey. By reading this book, you've accepted the challenge to pave a path to an effective and sustainable quality culture within your practice and the organizations you serve. Remember, if you are building the process in the face of doubt, or if initial team enthusiasm begins to wane, the time you take to build a quality management system is an investment in your learners, your team, your organization, and ultimately, in your career as an L&D professional.

CHAPTER 1
Introduction to Quality Management

IN THIS CHAPTER:

- Quality management defined
- A brief history of quality management
- Benefits of implementing a quality management system

In L&D, we create presentations, workbooks, reference guides, digital products, and many other items. We refer to them by their function, but ultimately, they are all products that take time, effort, and skill to design and produce. Production of any item is typically improved by following a consistently applied process, which helps ensure that each one is created in a uniform way, minimizing variations and defects. The oversight that standardization provides often results in more reliable products, boosting customer confidence and streamlining troubleshooting when issues arise.

L&D products are not immune to needing strategic oversight. We make decisions similar to those in other industries. Are you building a car? No, but you may be designing and developing products that support those who do. Errors in their training and reference materials influence a worker's ability to build cars successfully, so why shouldn't our products be subject to rigorous protocols as well?

During my time working in technical support, in addition to training and technology, I learned about the concept of quality itself. It remains the most influential era of my career because I learned about consequences—how one decision you make may affect an entire network and all the people who depend on it. I was also introduced to the idea that quality doesn't just happen when you're being careful and working hard. Quality has to be systematically controlled.

In my first technical support position, I worked at a help desk for a financial software company. I had no insight into how they managed software production, but the decisions made during that process directly influenced the technical support team. The company mailed new software (on 10 floppy disks!) every month that subscribers then installed themselves. In nearly half of the 12 releases a year, customers would experience problems after installing the product ranging from the software repeatedly crashing to the subscriber's computer no longer booting into Microsoft Windows.

The company had a software quality management team. In fact, the technical support manager often loaned out my team members to the quality management team to assist in running through test scripts. It was tedious, but it made us more sympathetic to the developers' plight. In retrospect, garnering empathy from the technical support team may have been the objective, because we often complained about the subscriber's frustrations.

As a learning designer and e-learning developer, I often reflect on my days in technical support and my introduction to quality testing. I think about releasing products with good intentions—knowing you've checked every screen, button, and word—yet clients still experience the unexpected. I've even grown to appreciate my previous employer's laborious quality testing exercise because the process was at least documented and structured with instructions and expectations so clear that the process could be handed off to a newbie who had only been working with technology for a year. However, regardless of my efforts, I'm sure that some of the features I tested myself still contained errors.

Starting at the Beginning

We all knew how my previous employer's financial software was supposed to function. The software was coded according to specifications dictated by a standard for how subscribers gain value from the tool. We were testing against the standard's guidelines. Without them, we could only test against our assumptions or expectations. You may have experienced a similar situation with new gadgets or software. You fumble your way through the process based on expectations, and if something doesn't meet them, you don't know whether you're wrong or the device is not working. It's always helpful to have some idea of how something is supposed to work. A printer should print. If you double-click an icon, the corresponding software program should open. But what if there is no specific way

for the object to function? How can you determine whether something met your expectations if you don't know what to expect?

Quality management begins with crafting your team's quality management mission, which is influenced by your team's goals regarding quality and the type of product or service being evaluated. Next, you develop a standard to support the mission. Guidelines then support the standard. In fact, the standard is primarily a collection of guidelines. For example, suppose one element of your team's mission is supporting employees beyond the structured learning experience. To enforce that mission, the team creates a guideline within the standard stating that every learning experience will include an easily accessible performance support tool formatted with a specific template. The policy that supports the guideline says the learning designer posts the templated performance support PDF on the intranet. The instructions for locating and applying the template and uploading the final support document are listed as procedures that support the policy.

Thus, if a designer does not create the performance support document for a given course, the course violates the policy, does not comply with the guideline, and ultimately does not support the standard. The same is true if the designer uses a different template, uses the appropriate template but misapplies it, or creates the document correctly but does not post it in the appropriate location. Because this standard is not met, the designer has not ensured the learner is supported beyond the structured learning experience, and the product does not meet its quality goals. Ultimately, this may put performance, and the organization, at risk.

If the challenge of creating and upholding the standard was not readily apparent to you before, it should be crystal clear now. How does the team achieve consensus on the mission or standard that supports it? Are there any exceptions? If so, what are they, and what mechanism will designers use to request an exemption? What if people do not know how to use the template? And, perhaps more importantly, what will you gain or lose by using a standard as the road map to provide value to the organization? Answering these questions is what the process of defining your standard is for.

While creating a quality management system may seem daunting, there is good news. First, you already have guidelines and use them to make design decisions, whether or not you are fully aware you're doing so. They may not be documented, entirely evidenced based, or applied consistently, but they exist. Second, while there are few concrete standards backed by consensus in our industry,

there are guidelines and best practices for L&D work lurking inside the volumes of expert literature. You may also borrow guidelines from other industries. For example, you can find writing and usage guidelines in style guides. Interface design is its own discipline rich with research and best practices. The publishing industry depends on rules regarding layouts that guide readers through documents. The road to quality management is paved with standards but begins with defining the term itself.

A Brief History of Quality Management

"Quality has to be managed—it will not just happen" (Oakland, Oakland, and Turner 2021). *Quality management* is often defined as the systematic approach to ensuring that products and services meet stakeholder expectations and guidelines. Stakeholders are usually people with a vested interest in the product or service being created. For example, they could be the product's end users, like learners, or organizational leaders sponsoring the endeavor.

The history of quality management can be traced back to medieval Europe, where craftsmen organized into guilds that enforced rules for product and service quality. With the advent of the Industrial Revolution, quality management shifted from craftsmanship to factory production, where inspection and statistical methods were used to control quality. Modern quality management is framed by the people who contributed to its evolution. These experts introduced concepts, such as total quality control, zero defects, and continuous improvement.

Shewhart's Plan-Do-Check-Act (PDCA) Cycle

The origins of modern quality management can be found in early 20th century with the pioneering work of Walter A. Shewhart. His theories and techniques are still used today to identify defects, reduce variation, and improve product and service quality while reducing the costs associated with production. Shewhart proposed the plan-do-check-act (PDCA) cycle, which is a four-step quality management method used to ensure that product or service quality is continuously monitored and improved. The *plan phase* involves studying the current state, setting goals, and developing an improvement plan. The *do phase* requires implementing the plan on a small scale and collecting data to evaluate its effectiveness. During the *check phase*, you analyze the data collected during the do phase to determine if the changes have improved the quality. Finally, the *act phase*

focuses on implementing the changes on a larger scale and standardizing the new process or approach.

When I first learned about PDCA, I considered its similarity to the ADDIE model. If you're unfamiliar with ADDIE, it's a process framework used in education and training. It consists of five phases: analysis (identifying learning needs), design (planning the learning experience), development (creating the learning experience), implementation (delivering the learning experience), and evaluation (assessing effectiveness). It shows how much our production work resembles other industries, so it's not a stretch to borrow from strategies used outside L&D.

Shewhart's work on statistical process control (SPC) laid the foundation for modern quality management practices. SPC is a quality management method that involves monitoring a process to identify and respond to variability in that process. SPC consists of analyzing data to determine the cause of the variation and then taking corrective action to eliminate it. PDCA and SPC are key components of modern quality management practices used in many industries worldwide.

PDCA is relevant to L&D quality processes because it can be used to determine the impact of *variation*, which, in quality management, refers to differences in a product or service that affect its overall quality. For example, even without a formal, documented quality management system, we review L&D materials against our expectations for those materials. Our expectations go beyond errors or features that do not conform to our criteria for what a workbook should look like, given its role in the learning experience. We are searching for problematic variations from our shared understanding of how a learner should be able to engage with a workbook during a workshop. And it's not just our expectations as an industry. Workshop participants also expect consistency when using workbooks.

Variations can be caused by differences in how a product is manufactured or how a service is delivered. If different designers are working on projects, variability is inevitable. The goal should not be to eradicate all variability among learning products. However, managing variation is a critical component of quality management because reducing it can lead to improved product or service quality and increased customer satisfaction. This principle makes more sense once you create products and services based on guidelines and seek to minimize outcomes that vary from them. The PDCA principles will also be reflected in the recommended

methodology this book provides. Specifically, the plan phase supports the idea that quality considerations should be planned early in the design process rather than waiting to address issues after finding them following production.

The Juran Trilogy: Quality Control, Improvement, and Planning

Joseph Juran was an engineer and management consultant widely regarded as the father of modern quality management. He is credited with developing the Juran Trilogy, which includes quality planning, control, and improvement. The trilogy helps organizations ensure that their products and services meet or exceed customer requirements by focusing on the planning, control, and improvement of quality throughout the entire organization.

In learning and development, the Juran Trilogy may work like this:

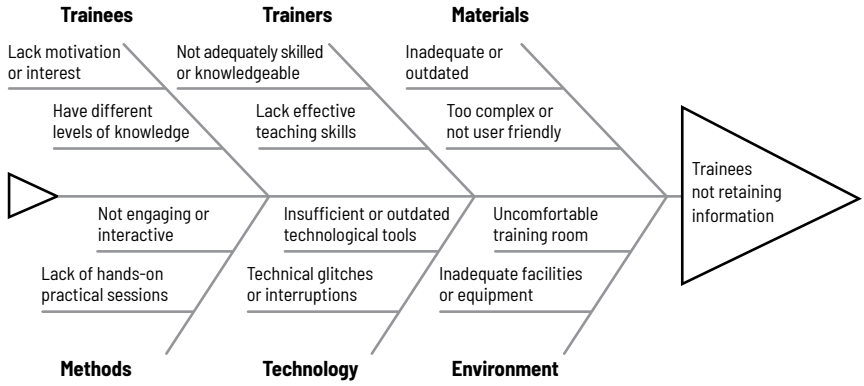
- **Quality planning** involves setting clear and measurable objectives for training programs or educational courses.
- **Quality control** involves monitoring and evaluating design and development processes to ensure they align with established objectives.
- **Quality improvement** focuses on continuously enhancing programs and processes according to the data collected during quality control and making adjustments to optimize learning outcomes and efficiency.

Juran's contributions to quality management include the development of the Pareto principle, which states that a few causes are responsible for a large percentage of the problems in a process or system. It's often called the 80/20 rule because it suggests that roughly 80 percent of outcomes result from 20 percent of causes. In quality management, it's used to identify the most critical issues that need to be addressed to achieve the most significant impact on quality improvement. The Pareto principle is relevant to L&D professionals because it encourages us to avoid making assumptions about how quality is being compromised. For example, suppose you are receiving inconsistent results from a vendor. Rather than replacing that vendor, you may change your process to include a more effective way to communicate your expectations. Instead of only emailing the vendor's team the style guide and assuming they will read it, you can make the quality discussion part of your kickoff meeting and include a walk-through of the style guide. In other words, depending on the issue's root cause, a small change can make a significant impact.

Ishikawa's Fishbone Diagram

Identifying the root causes of barriers is vital to developing sustainable quality management processes. Consequently, using tools to pinpoint cause and effect is essential. Kaoru Ishikawa, an engineer and quality control expert, is known for developing the Ishikawa (fishbone or cause-and-effect) diagram (Figure 1-1). This diagram is a tool for identifying the root cause of a problem or issue and developing solutions to address it. For example, instead of making assumptions about the relationship between a designer's skill set and course errors, consider other causes, like barriers to success.

Figure 1-1. The Fishbone Diagram



Feigenbaum's Total Quality Control

While I've focused on L&D's role in quality management, quality is the responsibility of everyone in the organization, which is the driving force behind *total quality control*. Armand Feigenbaum, an American quality control expert, is credited with developing the total quality control concept. It emphasizes the importance of quality control at every stage of the production process, from design to delivery. This approach is based on the idea that quality is not the responsibility of a single department or individual but rather it's a shared responsibility across the entire organization. In other words, you are not burdening your SMEs by including them in the review process. It's their responsibility to assess accuracy and guideline compliance.

Deming's Quality Management Contributions

The four founders I've mentioned so far are instrumental in how we approach quality management today. However, the founder whose practices align most closely with how L&D professionals engage in quality management is William Edwards Deming, a renowned American statistician, educator, and management consultant born in Sioux City, Iowa. Deming incorporated statistical methods, which are tools used to analyze data and make informed decisions.

For example, suppose completion rates for a new course are far below those of similar courses. Along with investigating other causes, an L&D professional might use statistical process control (SPC) to help identify a quality issue by continuously monitoring course completion rates, as well as control charts, which are graphical tools used in SPC to monitor the stability and performance of a process over time. In this case, one control chart displays data points for completion rates of each module or course, plotted over time. It helps you visualize trends, variations, and any data points that fall outside established control limits, signaling potential issues in course completion rates. When completion rates for a specific module consistently fall below the control limits on the chart, it indicates a problem that needs investigation and corrective action. If the module's confusing content is found to be contributing to the drop, completion rates should improve after it is revised.

Deming's statistical methods were beneficial during World War II. He later became involved with the Union of Japanese Scientists and Engineers (JUSE), where he lectured on statistical methods and modern quality principles. Deming's work was mostly unknown in the United States until an episode of the television documentary series *NBC White Paper*, "If Japan Can . . . Why Can't We?" aired in 1980. It explored the reasons behind the decline of American manufacturing and the rise of Japanese industry. It also examined the different approaches taken by both countries and suggested that the United States could learn from Japan's emphasis on quality, innovation, and continuous improvement. Deming became well known and highly regarded in the worldwide quality management community after the episode aired.

Deming's teachings encourage managers to focus on variability and understand the difference between common causes and special causes of variation in a process. *Common cause variation* is inherent in the process and results from random factors that cannot be controlled. Alternatively, *special cause variation* occurs

because of specific factors that can be identified and addressed. Deming believed it was essential to distinguish between the two types of variation to effectively improve a process.

For example, suppose student engagement in an online, multisession course is fluctuating. Common cause variation in online learning might manifest as minor fluctuations in student engagement levels throughout a course; levels may naturally ebb and flow due to factors like daily routines, personal commitments, or outside distractions. These variations are typical and expected within the online learning context, and they do not necessarily indicate a significant problem with the course or its design. However, a sudden and significant decrease in course engagement represents a special cause variation because it cannot be attributed to normal fluctuations. This sudden decrease may occur due to a specific issue, such as technical problems or negative informal feedback about the course content, instructor, or the overall learning experience.

Deming's Plan-Do-Study-Act (PDSA) Cycle

Deming also encouraged organizations to adopt a systematic problem-solving approach, later known as the Deming Cycle, or the Plan-Do-Study-Act (PDSA) cycle. Shewhart's PDCA and Deming's PDSA cycles are both iterative models for continuous improvement. However, Deming's PDSA cycle emphasizes the importance of studying the results of an implemented change before acting on them, allowing for data-driven decision making and a more accurate understanding of the change's impact.

The PDSA cycle's four steps and their corresponding activities are:

- **Plan.** Define the problem and aim or intent, develop a hypothesis, set targets, and develop a suitable recommendation.
- **Do.** Implement the plan on a small scale and record, observe, and collect data.
- **Study.** Analyze the results to determine if the plan was successful.
- **Act.** If the plan was successful, implement it on a larger scale. If not, adjust the plan and repeat the cycle.

Both *study* in the PDSA cycle and *check* in the PDCA cycle involve evaluating the outcomes of the actions taken during the respective *do* phases. PDSA's *study* step is more focused on learning and gaining a deeper understanding of

the process and its outcomes. It involves ongoing data collection and analysis to refine understanding. The PDCA cycle's *check* step is more focused on confirming whether the objectives were met and the actions align with the original plan—it often serves as a validation step. The choice between the two methodologies typically depends on an organization's specific needs and the desired emphasis on learning and goal achievement.

Deming's 14 Points

Deming's 1986 book, *Out of the Crisis*, is considered a seminal work in quality management. It provides a comprehensive framework for improving quality and productivity in organizations, emphasizing the importance of a systematic and integrated approach to management. Deming also introduces his famous 14 points for quality management, which is a set of management principles that provide a framework for improving the quality of products and services while increasing organizational efficiency. They also emphasize the importance of leadership, continuous improvement, eliminating barriers between departments, and employee engagement.

Reflecting on the 14 Points

Deming's 14 points are listed in Table 1-1 with corresponding reflection questions about how each point manifests in your organization. The answers to these questions facilitate understanding Deming's 14 points and begin the information gathering process.

Table 1-1. Deming's 14 Points

	Deming's Points	L&D Reflection Questions
1.	Create constancy of purpose toward improvement of product and service; aim to become competitive, stay in business, and provide jobs.	What mission or guiding philosophy supports your team's quest to design and develop high-quality products?
2.	Adopt the new philosophy. We are in a new economic age. Western management must awaken to the challenge, must learn their responsibilities, and take on leadership for change.	How does leadership demonstrate that they are ready to develop, champion, and consistently enforce a quality-first approach?
3.	Cease dependence on inspection to achieve quality. Eliminate the need for inspection on a mass basis by building quality into the product in the first place.	What is your team's approach to controlling quality throughout the design and development process, rather than solely relying on inspection at the end?
4.	End the practice of awarding business on the basis of price tag. Instead minimize total cost. Move toward a single supplier for any one item, on a long-term relationship of loyalty and trust.	How does your process for selecting vendors emphasize proof of quality over price?
5.	Improve constantly and forever the system of production and service. To improve quality and productivity, and thus constantly decrease costs.	How does your team integrate process and quality improvement discussions into your team and one-on-one meetings?
6.	Institute training on the job.	How are employees within your organization encouraged to share knowledge, collaborate, and learn in the flow of work?
7.	Institute leadership. The aim of supervision should be to help people and machines to do a better job. Supervision of management is in need of overhaul, as well as supervision of production workers.	What role does L&D leadership play in establishing and supporting design and development processes?
8.	Drive out fear, so that everyone may work effectively for the company.	How does leadership support your team's ability to communicate their concerns about design and development processes, like unrealistic deadlines?
9.	Break down barriers between departments.	How collaborative are your development and design processes when working with SMEs and stakeholders from other departments?

Table 1-1. (cont.)

	Deming's Points	L&D Reflection Questions
10.	Eliminate slogans, exhortations, and targets for the workforce asking for zero defects and new levels of productivity. Such exhortations only create adversarial relationships, as the bulk of the causes of low quality and low productivity belong to the system and thus are beyond the power of the workforce.	How does your team's leadership define productivity? What other guidelines are your team measured by?
11.	A. Eliminate work standards (quotas) on the factory floor. Substitute leadership. B. Eliminate management by objectives. Eliminate management by numbers, numerical goals. Substitute leadership.	How is productivity measured? How are designers and developers supported as they navigate the production process and meet productivity goals and deadlines?
12.	A. Remove barriers that rob the hourly worker of his right to pride of workmanship. The responsibilities of supervisors must be changed from sheer numbers to quality. B. Remove barriers that rob people in management and in engineering of their right to pride of workmanship. This means abolishment of annual or merit rating and of management by objectives.	What barriers to quality exist in your design and development processes? For each one, what steps can be taken toward removing or reducing the impact of these barriers?
13.	Institute a vigorous program of education and self-improvement.	How are the individuals on your team encouraged to improve their skills to better meet expectations?
14.	Put everybody in the company to work to accomplish the transformation. The transformation is everybody's job.	How are expectations about their roles in the design and development processes communicated to SMEs and stakeholders?

How Implementing a Quality Management System Benefits L&D

Your answers to the reflection questions in Table 1-1 may have encouraged you because your team is well on its way, or maybe they discouraged you and left you wondering if your team will ever get where you think it needs to be. If it's the latter, rest assured—while your team may not have a formalized process, there are some guardrails in place; otherwise, none of your projects would be successful—and that's unlikely. Knowing the benefits of implementing a quality management

system will help galvanize your team to get started, regardless of how near you are to your destination. Frankly, only you and your team will know the benefits because you know what problems you're solving. However, most benefits will serve all L&D groups, although they may manifest differently depending on your organization's structure and production process.

Some benefits will be seen and felt sooner than others. Immediately, you should notice fewer errors in your L&D materials. Many people may think that error reduction is inconsequential, but it has far-reaching implications beyond catching missed commas. Because it leads to less time spent reworking material, a financial and resource management benefit exists for the L&D team and your organization. Fewer errors in the distributed materials also mean fewer disruptions to the learning experience.

But the real benefits go beyond finding and fixing errors. With a formalized and consistently applied quality management system, teams may:

- **Gain clarity into the design and development procedures.** Since there is no one way to design and develop instruction, practitioners have created their own procedures. It's necessary to encourage them to document these practices because adopting new practices is challenging if you do not understand existing ones.
- **Streamline existing processes and formalize new ones.** Once you know what procedures exist, it's easier to simplify or abandon them altogether. Also, formalizing processes by documenting them and adjusting timelines to accommodate their steps increases the likelihood of following them.
- **Prioritize the importance of quality policies and procedures.** Many L&D professionals have been led to believe that their profession does not exist. You may have heard comments like, "Anyone can create training. It's just PowerPoint." Or been told that our work consists of simply making presentations pretty or (my favorite) fancy. While these statements range from irritating to downright false, L&D professionals should be able to present, or at least articulate, what our processes are in simple language. Presenting quality procedures as formalized and documented steps can go a long way in notifying the rest of the organization that we mean business.

- **Provide guidelines for design teams.** It's helpful for people to understand what's expected of them and have guidelines to support those outcomes. Guidelines are based on standardization, which involves the creation of specific, universally accepted guidelines or protocols. These standardized guidelines describe criteria, procedures, or specifications that ensure consistency and quality in various processes, products, or services across industries, resulting in higher customer satisfaction and cost-effective production. But many believe that guidelines and standards can discourage creativity and innovation. Consequently, while your team may be willing to adopt quality management processes in theory, they may resist in practice because doing so will inevitably result in a loss of some control. A point that I will repeatedly make throughout this book is that no quality management system should be presented as punitive, and I encouraged you to communicate that point early and often. Also, the focus should be on the quality of the course, not the quality of the course's designer.

Throughout this book, you'll be encouraged to add to this list of benefits. Understanding how you, your team, and your organization will benefit—and being able to share that information—is an essential part of the commitment process.

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Index

Page numbers followed by *f* and *t* refer to figures and tables, respectively.

A

accessibility, 97
active listening, 53
act phase (PDCA cycle), 5
act phase (PDSA cycle), 9
ADDIE model, 5
administration processes, 88
American Society for Quality (ASQ), viii, x, 25, 27, 44–46
ANSI/IACET Standard for Continuing Education and Training, 84, 91
ASQ. *See* American Society for Quality
awareness, responsibility for, 71

B

biases, 51, 94
brainstorming, 54
budget, project, 80
budget allocation, 80
budget management, 73
business analyst role, 75

C

cause-and-effect diagram, 7, 7*f*
Certified Professional in Training Management program, 87
change management, 71
channels
  communication, 81
  to support quality control, 129–131
checklist assessments, 144
check phase (PDCA cycle), 4, 10
collaborative space, creating, 62
commitment
  for approach to quality management, 32–35, 35*t*, 36*t*
  Gauging Commitment Questionnaire, 34–36, 35*t*–36*t*
common cause variation, 8, 9
communication
  responsibility for, 71, 73
communication channels, 81
communication content, 81
communication frequency or schedule, 81
communication goals, 81
communication plan, 80–81
communication strategy lens, 90, 98–99
compliance
  consequences for noncompliance, 33–34, 85
  reviewing for (*See* quality review [QR])
  by vendors, 163–164
compliance indicators, 143
consensus on quality, reaching, 48–49, 53–54. *See also* defining quality
consensus surveys, 110
consequences, of ignoring QA guidelines, 33–34, 85
consistency principle, 97
consultants, 75
content
  of communications, 81
  lenses for viewing, 89–90
content processes, 88
contingency funds, 80
continuity, 93
costs, direct and indirect, 80
Crosby, Philip, 25
customers, identifying, 46–48
customer satisfaction, 49
customer standards, 47–48

D

defining quality, 23, 43–57
  in case study, 54–55
  and "free of deficiencies" vs. "perfect," 46–47
  individual differences in, 44–45
  initial definition (step 1), 49–52
  to meet customer standards, 47–48
  process of, 48–49, 85
  recording and confirming the definition (step 4), 54
  stated and implied needs in, 45–46
  team discussion to reach consensus (step 3), 53–54

using definition to create mission, 55–57, 57*t*
working meeting (step 2), 52–53
deliverables, 62, 64
delivery processes, 88
Deming, William Edwards, 8–10, 19, 25
14 points, 10, 11*t*–12*t*
plan-do-check-act cycle, 4–6, 9–10
demonstrations, 62
design procedures, gaining clarity into, 13
design teams, 14, 137
developing standards, 3, 102–111. *See also* quality assurance (QA)
evidence-based, 103–104
finalizing standards, 109–111
identifying guidelines, 102–103
verifying or testing guidelines, 108–109
writing guidelines, 104–108, 106*t,* 107*t*
development procedures, gaining clarity into, 13
direct costs, 80
documentation
in formalized QM systems, 17
for performance support, 3
as project deliverable, 84
of quality control, 26
of quality management process, 17–18
to support quality control, 126–127
of team's definition of quality, 54
documentation development, 71
documentation maintenance, 71
document design, 95
do phase (PDCA cycle), 4
do phase (PDSA cycle), 9
Duffy, G.L., x, 25, 27, 44, 45

E

effectiveness, 33
80/20 rule, 6
empathy, 165
engagement, 16, 70, 94, 110
"error free," 46, 47
errors, vi, 13
identifying, 33
recording, 50–51
evidence-based standards/guidelines, 103–104

F

facilitation team, 39, 39*f*
feedback, 110, 130–131, 138
Feigenbaum, Armand, 7
figure-ground, 93
First Principles of Instruction, 92
fishbone diagram, 7, 7*f*
Fitts's Law, 96
flexibility, in QMSs, 17, 32
fonts, readable, 141–142
formalized quality management systems, 16–19
14 points, 10, 11*t*–12*t*
"free of deficiencies," 46–47
functional lenses, in scoping standards, 89–90
functional processes, identifying, 86–89
Furterer, S.L., x, 25, 27, 44, 45

G

Gagne's Nine Events of Instruction, 92
gap analysis, 111
Gestalt principles, 93
Getting Started Worksheet, 41–42
goals
communicating, 53
in communication plan, 81
of L&D clients, 20
in project plan, 60, 61
of quality review, 137–138
of revision process, 111
time vs. quality, 22
graphic design, 93
guidelines, 3–4, 85
for accessibility, 97
competencies, knowledge, and skills to meet, 23, 99
consequences of ignoring, 33–34
for design teams, 14
developing and implementing, 83–84 (*See also* quality assurance [QA])
evidence-based, 103–104
in formalized QM systems, 17
identifying, 102–103
rules vs., 85
transformed into quality review criteria, 140–143
vendor compliance with, 163–164
verifying or testing, 108–109
writing, 104–108, 106*t,* 107*t*

H

Hick's Law, 96, 130
history of quality management, 4–12
Deming's quality management teachings, 8–9
Feigenbaum's total quality control, 7
Ishikawa's fishbone diagram, 7, 7*f*
Juran trilogy, 6
Shewhart's PDCA cycle, 4–6

I

identifying guidelines, 102–103
implementation
by process owner, 69
of standards and guidelines, 83–84 (*See also* quality assurance [QA])
implied needs, 45–46
indirect costs, 80
initial definition of quality, 49–52
inspection, 27, 134. *See also* quality review (QR)

instructional design, 91
interaction design, 96
interface design, 4, 95
interface design lens, 90, 95–97
intrinsic risks, 77
Ishikawa, Kaoru, 7
Ishikawa diagram, 7, 7*f*
ISO 30422 Human Resource Management — Learning and Development, 84–85, 91
ISO TS 30437 Human Resource Management — Learning and Development Metrics, 85, 91

J

Jakob's Law, 97
job aids, 127–129, 152–153
Juran, Joseph, 6, 25
Juran Trilogy, 6

K

kickoff QR email template, 153–154

L

L&D. *See* learning and development
L&D business partners, 38–39, 39*f*
leadership
  on L&D team solutions, 40
  support for quality by, 23, 37
learning and development (L&D)
  products of, 1
  professionalization in, vi
  quality for, vi
  quality management in, viii (*See also* quality management in L&D)
  status quo risk for, vii
  teams for (*See* team[s])
  training for, v–vi
  value of, vi, 60
learning architecture, 91
learning design, 91, 164
learning design lens, 89, 91–92
learning experience design, 91
learning experience design team, 38, 39*f*
learning technology team, 39, 39*f*
legitimizing process to stakeholders, 18–19

M

Merrill, David, 92
metrics, 33
Microsoft Excel, 146
Microsoft Writing Style Guide, 99
mindset, 19–24, 44, 158
mission, 3, 62
  definition of quality in creating your, 55–57, 57*t*
  in formalized QM systems, 17
  lack of agreement on, 162–163
  operationalizing, 83 (*See also* quality assurance [QA])
mission statement, 55–57, 57*t*
models, support, 117–118
motivation, increasing, 94

N

narrative description, from reviewers, 145
navigation design, 96
NBC White Paper, 8
needs, 45–46, 129
needs assessment, 50–51

O

Oakland, J.S., 4, 26, 47
Oakland, R.J., 4, 26, 47
objectives, 61, 111
onboarding materials, 64
outcomes, 49
Out of the Crisis (Deming), 10

P

Pareto principle, 6
PDCA (plan-do-check-act) cycle, 4–6
PDSA (Plan-Do-Study-Act) cycle, 9–10
"perfect," 46–47
pilot programs, 62, 104, 110
plan-do-check-act (PDCA) cycle, 4–6
Plan-Do-Study-Act (PDSA) cycle, 9–10
planning, 59. *See also* project plan
plan phase (PDCA cycle), 4
plan phase (PDSA cycle), 9
policies, 118
  in formalized QM systems, 17
  prioritizing importance of, 13
  to support guidelines, 3
  to support quality control, 118–119, 119*f*
  writing, 120, 120*t*–121*t*
procedures, 118
  design and development, 13
  in formalized QM systems, 17
  prioritizing importance of, 13
  writing, 123–125, 123*t,* 125*t*
process analysis and design, 69
process design and mapping, 71
process(es), 24–27, 24*f,* 118
  of defining quality, 48–49, 85
  documentation of, 17–18
  engagement of, 16
  in formalized QM systems, 17
  functional, identifying, 86–89
  identifying changes needed for, 113
  of quality management in L&D, 30–31 (*See also* quality review)
  for quality review, 137–140, 146–154, 158
  streamlining and formalizing, 13
  tracking success and value of, 19
  types of, 88
  writing, 121–122, 122*t*

process leads
deprioritization by, 67
dividing responsibilities of, 160–161
QMS management by, 119
role and responsibilities of, 70–72
senior learning designer as, 75
process owners
deprioritization by, 67
dividing responsibilities of, 161
L&D managers as, 75
role and responsibilities of, 68–70
project deliverables, 62, 64
project initiation and planning, 70
project integrity, 73
project manager, 72–73, 75
project plan, 60–81
budget section in, 80
building, 60–61
communication plan section in, 80–81
goals and objectives section in, 61
project deliverables section in, 64
project scope section in, 62–63
project timeline section in, 64–68, 66*t*
risk management section in, 76–79, 79*t*
roles and responsibilities section in, 68–76, 76*t*
using sections of as phases, 159–160
project planning responsibility, 72
project scope, 62–63
project sponsor, 74
project timeline, 64–68, 66*t*
accuracy of, 21–22
influence on QMS of, 37
need for, 60
proximity, 93

Q

QA. *See* quality assurance
QA document, 64
QC. *See* quality control
QC document, 64
QM (Quality Matters), 84, 91
QMSs. *See* quality management systems
QR. *See* quality review
QR checklist, 64
quality, vi
consequences of, 1
defining, 20–21, 24*f,* 25 (*See also* defining quality)
impact of, ix
issues with, viii
value of, 16
for your team (*See* defining quality)
quality assurance (QA), 24*f,* 25–26, 83–114
committee for, 100–101
developing standards for, 102–111
guidelines for, 85, 102–109
key questions for, 112–114
revising standards for, 111–112
scoping standards for, 86–99
standards for, 84–85
quality control (QC), vi, 6, 24*f,* 26, 115–131
checklist for, 115
support channels for, 129–131
support model for, 117–118
support policies for, 118–119, 119*f*
support resources for, 126–129
total, 7
writing policies for, 120, 120*t*–121*t*
writing procedures for, 123–125, 123*t,* 125*t*
writing processes for, 121–122, 122*t*
quality-first mindset, 19–24, 44, 158
quality improvement, 6
quality management, viii, 1–12
continuous, 85–87, 86*t*
history of, 4–12
value of, vi–vix
quality management in L&D, 29–42, 30*f*
case study of, 37–41, 39*f*
factors influencing, 37
frequently asked questions about, 155–166
gaining commitment for, 32–35, 35*t,* 36*t*
Getting Started Worksheet for, 41–42
struggles with, 31
value of, 165–166
quality management systems (QMSs), 15–27
benefits to L&D of, 12–14, 156
defining quality in, 25
documenting process in, 17–18
formalizing, 16–19
legitimizing process to stakeholders in, 18–19
mission statements for, 55–57, 57*t*
process and basic terms of, 24–27, 24*f*
quality assurance in, 25–26
quality control in, 26
quality-first mindset in, 19–24
quality planning in, 25
quality review in, 27
questions about assembling, 156–158
questions about developing, 158–163
questions about life with, 163–165
support structure for, 119, 119*f*
sustainable, 32, 124–125, 125*f*
tracking success and value of process in, 19
value of, vii–ix, 156
Quality Matters (QM), 84, 91
quality planning, 6, 24*f,* 25, 59–60. *See also* project plan
Quality Productivity and Competitive Position (Deming), 19

quality review (QR), 24*f*, 27, 133–154
case study of, 146–154
checklists for, 133
defined, 134
goal of, 137–138
guidance for, 148–150
guide for, 152–153
issue tracker for, 151–152
kickoff email template for, 153–154
preparing reviewers for, 139–140
process for, 137–140, 146–154, 158
quality reviewer training presentation, 147–148, 148*t*
scheduling, 137
testing vs., 134–136
timing of, 138
tools for, 143–146
transforming guidelines into criteria for, 140–143
welcome letter to reviewers, 150
writing criteria for, 146, 146*t*
quality reviewer guide, 152–153
quality review issue tracker, 151–152
quality test, 134–136. *See also* testing
questions about quality in L&D, 155–166
assembling the QMS, 156–158
in case study, 165–166
developing the QMS, 158–163
life with the QMS, 163–165

R

RACI chart/matrix, 75–76, 76*t*
rating scales, 144–145
recording definition of quality, 54
regulatory compliance analysis, 70
reporting
of financial information, 80
responsibility for, 71
Talent Development Reporting principles for, 90, 91
representation, 94
research
on best practices, 112
in defining quality, 50–51
for developing QMS, 157
on target audience, 130
resource management, 72
resources, 126
documentation, 126–127
influence on QMS of, 37
job aids, 127–129
for quality reviewers, 140
shortage of, 22–23
to support quality control, 126–129
tools and templates for, 129
responsibilities
delineated in project plan, 68–76, 76*t*
dividing, 160–161
sharing of, 73
responsive design, 96
review, vi. *See also* quality review (QR)
revising standards, 111–112
revisions, tracking, 66
risk assessment, 78
risk identification, 78
risk management, 72, 76–79, 79*t*
risk mitigation, 78
risk monitoring and control, 78
risks
intrinsic, 77
sustainability, 124–125, 125*f*
roles and responsibilities
dividing, 160–161
in project plan, 68–76, 76*t*
of quality reviewers, 139
on teams, 38–39, 39*f*
in working meetings, 52
rubrics, 143–144

S

scalability, in QM systems, 17
scheduling quality review, 137
scope, project, 62–63
scope statement, 63
scoping standards, 86–99
communication strategy lens in, 98–99
functional lenses in, 89–90
identifying functional processes in, 86–89
interface design lens in, 95–97
learning design lens in, 91–92
selecting what to include in, 89
visual design lens in, 92–95
Shewhart, Walter, 4
similarity, 93
simplicity, 32, 97
SMEs (subject matter experts), 74
SPC (statistical process control), 5, 8
special cause variation, 8–9
stakeholder engagement, 70, 110
stakeholders, 74
legitimizing process to, 18–19
standards input from, 111
standards, 84
as collections of guidelines, 3
developing, 3, 83–84, 102–111 (*See also* developing standards)
finalizing, 109–111
guidelines supporting, 85
in L&D industry, 84–85
need for agreement on, 20

oversight provided by, 1
revising, 111–112
scoping your, 86–99 (*See also* scoping standards)
standards committee, 100–101
stated needs, 45–46
statistical process control (SPC), 5, 8
stereotypes, challenging, 94
study phase (PDSA cycle), 9
subject matter experts (SMEs), 74
support
leadership, 23, 37
rationale for layers of, 166
support models, 117–118
channels, 129–131
defined, 117
policies, 118–119, 119*f*
resources, 126–129

T

Talent Development Reporting principles (TDRp), 90, 91
task forces, 110
team(s)
challenges with, 162, 164–165
defining quality for (*See* defining quality)
guidelines for, 14 (*See also* guidelines)
identifying changes needed for, 113
influence on QMS of, 37
products of, 40
reaching consensus in, 53–54
resources for and capabilities of, 22–23
roles and responsibilities of, 38–39, 39*f*, 68–76, 76*t*
training in L&D for, 158
technology integration, 71
technology processes, 88
templates
as deliverable, 84
in formalized QM systems, 17
graveyards of, 157
to support quality control, 129
terminology definitions, 24–27
testing
of guidelines, 108–109
plans, cases, and scripts for, 135
quality review vs., 134–136
user experiences following, 2–3
timeline. *See* project timeline
time required
for developing QMS, 159
for quality reviews, 138
timing, of project steps, 67
tools
as deliverable, 84
in formalized QM systems, 17
for personnel management, 75–76, 76*t*
in project planning, 60
for quality review, 143–146
to support quality control, 129
total budget, 80
total quality control, 7
Total Quality Management and Operational Excellence (Oakland, Oakland, and Turner), 26, 47
tracking
of QR issues, 146, 146*t*
of revisions, 66
of success and value of process, 19
training
for quality reviewers, 140, 147–148, 148*t*
responsibility for, 71
of team members in L&D, 158
Training Process Framework, 87–88
Turner, M.A., 4, 26, 47
typos, vi

U

usability, 96

V

variation, 5–6
common cause, 8, 9
special cause, 8–9
vendor compliance, 163–164
verifying guidelines, 108–109
version control strategy, 127
visual design, 92–93
visual design lens, 90, 92–95

W

WCAG (Web Content Accessibility Guidelines), 84
welcome letter, to quality reviewers, 150
workflow changes, 114
working groups, 110
working meeting, to define quality, 52–53
writing
guidelines, 104–108, 106*t*, 107*t*
policies, 120, 120*t*–121*t*
procedures, 123–125, 123*t*, 125*t*
processes, 121–122, 122*t*
quality review criteria, 146, 146*t*
writing style guides, 98–99

Z

"zero defects," 25

About the Author



Hadiya Nuriddin is a highly accomplished and award-winning L&D professional. She's known for her extensive expertise in educating professionals to enhance their job performance. Her qualifications include a master of education in curriculum design and a master of arts in writing and publishing from DePaul University, where she graduated with distinction. She also holds a bachelor of arts in English from Michigan State University.

Her key qualifications are diverse and comprehensive, encompassing learning strategy consultation, instructional and curriculum design, e-learning development, webinar development and delivery, project management, artificial intelligence utilization, learning technologies implementation, and quality management system design.

Since March 2008, Hadiya has been leading Duets Learning as the owner, senior learning strategist, and senior instructional designer. In this role, she specializes in consulting with both small and large organizations to improve performance through various learning solutions, including online, classroom-based, blended, and on-the-job methodologies. Her accomplishments include developing e-learning and instructor-led solutions for clients in a variety of sectors, such as banking, finance, insurance, technology, retail, pharmaceutical, professional services, oil and energy, media, nonprofit, and association management. She's also won two talent development awards: ATD's Talent Development Outstanding Professional Award and The Learning Guild's Guild Master Award.

In addition to her professional endeavors, Hadiya has an impressive background in facilitation. She has taught workshops for ATD Education since 2017, covering topics like writing for instructional design and training and e-learning instructional design. Her academic experience includes designing and leading courses at Southern New Hampshire University, Triton College, and the University of San Diego.

Hadiya also holds several certifications, including the Certified Quality Improvement Associate (CQIA) from the American Society for Quality, Certified Professional in Training Management (CPTM) from Training Industry, Certified Change Practitioner from Prosci, Certified Virtual Facilitator from the International Institute for Facilitation, and Certified Professional in Talent Development (CPTD) from ATD.

Hadiya is also an accomplished author. Her previous book *StoryTraining: Selecting and Shaping Stories That Connect* was published by ATD Press in 2018. She wrote two issues of *TD at Work*: "Get the Whole Picture With a Performance Assessment" and "Power E-Learning With Stories." Hadiya also authored a chapter in *ATD's Handbook for Training and Talent Development*, "Delivering as if Learning Depended on It." In addition, she maintains an active role in the learning community as a presenter at conferences held by ATD, The Learning Guild, and *Training* magazine, and has helped organize the Chicago eLearning & Technology Showcase since 2012.

Hadiya's career is a testament to her dedication to the L&D field, marked by her significant impact on both organizational performance improvement and the broader learning community.

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The Association for Talent Development (ATD) is the world's largest association dedicated to those who develop talent in organizations. Serving a global community of members, customers, and international business partners in more than 100 countries, ATD champions the importance of learning and training by setting standards for the talent development profession.

Our customers and members work in public and private organizations in every industry sector. Since ATD was founded in 1943, the talent development field has expanded significantly to meet the needs of global businesses and emerging industries. Through the Talent Development Capability Model, education courses, certifications and credentials, memberships, industry-leading events, research, and publications, we help talent development professionals build their personal, professional, and organizational capabilities to meet new business demands with maximum impact and effectiveness.

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