What are some strategies that can be used to ensure the client's expectations are met?

When I think of client expectations, that's a negotiable item. We want to negotiate with the client, what are reasonable expectations? One of the strange things I found with almost every client is that they don't have the language to tell you what's in their head, necessarily, because of instructional design. You know we have a language that we use for that. But they have a pretty precise idea. They've seen something somewhere. They're basing it on something they've seen, or some ideas that they've had, where they have an idea but they may not be able to express it. So I want to spend time with that client well ahead of time saying, "What are you seeing when that happens? What would a great product look like for you? What would a product look like that fails miserably?" And we talk about it with the client and with other stakeholders that might be involved. You want to identify those stakeholders early on. This is part of managing the expectations because lots of people have their fingers in an instructional design project pie. And one person answering for them and you want that one person who can sign off and say, "Yes, that's good enough," so that they'll kind of mediate the process for you. But by the same token, you want to make sure that you're respecting the interests of all the stakeholders who are involved. And so, you might have that client. Then you'll be working with one person, and that person might be in regular communication with the stakeholder community. And then every so often, you would unleash the portions of your team, who are involved in that particular part of the project and be working with those stakeholders directly, and communicating with them regularly and directly. The whole thing starts with a clear memorandum of understanding (MOU), or a contract. Contracts often involve, on the corporate side, you're dealing with timelines, deliverables, lots of money issues, and lots of fiscal issues with those. And they're reviewed regularly and at key stages. An MOU, for us, often launches things and we review it at each of the key stages, but we don't dwell on it. We try to move from it and start collaborating with the client to make sure that we're on the same page as we go. It's simple, really. It's simple and really difficult. It comes down to communication. And I know that just sounds so naive, but it's not. Communication is so hard to do well when you're working with so many people who are involved. But it means having the backbone to pick up a phone or text people regularly get in touch. You need to be sure that at every key point that people are involved, but you the problem is, that sometimes clients just want to hire you and say, "Take that away from me, I don't want that problem. That's what I brought you on board for. I want you guys to sort that out." Well, fine, but try to navigate that intelligently with your client, don't get too far away from them. Keep that person between yourself and trouble. In other words, because what the last thing you want to have happen is you make some key decisions that the client just hates. I can give you an example of that. That might come up later. But we had a project one time, where we were working with the fetal alcohol spectrum disorder (FASD) network in Saskatchewan. And we were developing brochures that would be in doctors' offices and around the province to just alert the public to certain things and what to look for. We had competing interests involved. We had stakeholders from the Indigenous communities who wanted to make sure that they were represented and these things were appropriate for their communities. Wonderful input on that. By the same token, we had to figure out how we represented those communities in the brochures. Because if we used culturally insensitive or even attempting to be sensitive imagery in the brochures, it could be seen as a very negative thing for those groups. And so, we wanted to be really careful about that. We ended up in those brochures, in our illustrations, using stick people because we didn't want them to be culturally specific or identified, because of how culturally loaded something like FASD can be. So that was a negotiation we had to have the client involved in and the stakeholders involved in and it took some back and forth to sort out an appropriate way to deal with what was a very real, very visceral and a potentially explosive problem. But regular meetings and updates arranged ahead of time are needed. And making sure that the client signs off at each key stage, those kinds of things are really important to making sure that everything goes as planned.

How involved is the client throughout the stages of the Instructional Design process?

I don't always know what the content is. In fact, I seldom know the content in any reasonable amount of depth, and that sort of thing. So, you need client representation. You don't always need the person who's signing off on things to be the person to do that. But working with the clients to say, "Can you find two or three people for me who can be touchstones? Who can actually join our teams, our design teams, and be part of the process from beginning to end?" Now, they don't have to do a lot of the grunt work of what goes on. But we would need people we can go to. I like to tell them that I need somebody to go to with all stupid questions. I'm going to have 1000 stupid questions. Who can I ask? I don't want to bother, perhaps the CEO of the organization every time that comes up, but I want to have straight answers to what that's about. It's a real trade off because it costs them in very real ways, (such as) in personnel time when they devote people to our projects. So, we have to be sensitive to that. But it can really go off the rails if we don't.

What are some ways that you dealt with problems that came up within a project? Was there a plan in place, or was more of a reactive approach taken?

Yeah, I think any responsible instructional designer is going to try and anticipate every problem that can come up. And will miss every time. They're always going to be surprises. They're often not happy surprises. And so how do you deal with those things? You have to be reactive. You have to be ready to react. You have to be ready to walk right into somebody's face, and say we have to solve this, we have a critical issue underway right now. Now, most of my interactions, I could tell you had been very positive. I haven't run into that many problems. But when there have been problems, they've been real. It's always a learning process. For me as a project manager. In my context, there's a power dynamic at play. And there is, in almost every instructional design team, (a power dynamic at play) between a project manager and the project team. But in an academic setting, it's two-fold. I mean, I'm also not just the project manager, I'm also the instructor, and I'm going to assign marks and that sort of thing. And that came into play. I can give you an example, I'd probably give you a better example than anything else. One time we were working with an organization. In fact, it was an organization that handed off a project to some people underneath. And those people underneath didn't know what was a reasonable thing to ask of team members. And so, for this organization, it was a volunteer organization. And one of the people I think came to one of our team members, and tried to come up with busy work for them. I think it's the only way I can figure out what happened. They said, "I'd like you to take these board meeting minutes for the last X amount of time. And by the way, we don't have any digital copies. But here they are printed. And I would like you to retype them and put them into a website, so people could access them." Now, why I am mentioning this one is because had I known that happened as a project manager, I would have put a stop to it right away. That's for one thing. Nobody wants board meeting minutes on it’s website. Nobody's ever going to download those documents. And it will take lots of hours to input that information again, to no effect, and my student isn't going to learn anything from it. In fact, that student started and did a lot of this work and was very reluctant to bring it up. Why? Because this person, this designer, thought it was reasonable to respond well to whatever the client asked. (They) really thought, as a new instructional designer, really hadn't questioned whether or not that was a good task to undertake, and was trying to do the right thing by the client. I had a lot of sympathy for the student. And the client, I don't really know where that came from. Once I found out, I put a stop to it. I just met with a client and said, “Really, is this something you want? And if you do, why don't you have people scan these documents, and we'll just deal with that, I don't think it's going to get a lot of usage. And it's not a good use of anybody's time.” That’s overall for a project manager to take in to defend those people. But because of that power dynamic that's there, and this could happen in a corporate setting too, between a project manager and the team that's doing the work, everybody's trying to do the right thing, and it ends up being the wrong thing. And if there's not that trust between a project manager and the team members, it can go sideways pretty quickly. But that's one example of that.