

The Five-Phase Framework

A working template for instructional design that earns its budget. Discover → Design → Build → Deliver → Measure.

Use this as a canvas, not a checklist. Copy the phase names into a doc, fill in what applies to your project, and cross out what doesn't. The goal is to make every phase a conscious decision — especially the measurement one.



Phase

Discover

Name the behavior you actually want to move. Everything else follows.

Activities

- Sponsor interview — what metric, what timeline, what counts as success
- SME action-mapping session — the 3-5 decisions learners actually get wrong
- Learner context — modality, device, time available, prior knowledge
- Kirkpatrick L3/L4 sanity check — can we attribute behavior change to this work?

Outputs

- One-page problem statement the sponsor signs
- Three measurable behaviors training will move
- A list of what this project is NOT solving

Heuristic

If Discovery takes less than a week, either the problem is trivial or you're skipping it.

02

Phase

Design

Design for the decision moment, not the content library.

Activities

- Modality decision — Rise, Storyline, code, blended, or job aid
- Scenario skeletons — the moments a learner chooses and the feedback for each branch
- Assessment design — one good question per behavior beats ten generic ones
- Accessibility + localization pass before a single slide is built

Outputs

- Storyboard or design doc the SME reviews in under 30 minutes
- Modality rationale the sponsor can defend
- Evaluation plan mapped to L1–L4

Heuristic

If a SME can't describe the scenario back to you in their own words, it isn't ready to build.

03

Phase

Build

Build the smallest useful thing, review it fast, and only then polish.

Activities

- Pre-build: asset library, template, voice guide — set once, reused everywhere
- Build: drafts end-to-end before any single slide is polished
- Polish: accessibility, motion, transitions, audio, and last-mile review
- AI-assisted scaffolding where it saves days without compromising voice

Outputs

- A reviewable v0.5 before you've invested in motion or audio
- A single style guide other builders on your team can follow
- Version-controlled source files (even in Rise — name conventions count)

Heuristic

Polish the whole thing a quarter inch, not one corner an inch.

04

Phase

Deliver

Delivery is a design problem. Comms, cadence, and manager enablement belong in the ID's lane.

Activities

- Launch comms — from, subject, timing, CTA — written by the ID, not copy-pasted
- Manager enablement — a one-pager so they can reinforce the behavior
- Pilot cohort — real learners, real feedback, before the org-wide rollout
- LMS QA pass — launch conditions, reporting tags, completion logic

Outputs

- A pilot readout the sponsor can use in their next leadership review
- A launch kit anyone can run without calling you
- A known list of things to fix in v1.1

Heuristic

The training is only as good as the context the learner encounters it in.

05

Phase

Measure

If you can't defend the number, you can't defend the program.

Activities

- L1 — reaction signals, not smile sheets
- L2 — knowledge check tied to the behavior, not the content
- L3 — behavior change observed on the floor, in the ticket, or in the system log
- L4 — the business metric the sponsor signed on Day 1

Outputs

- A dashboard the sponsor checks without you in the room
- A before/after story that names what you'd change in v2
- A documented what-I'd-change list — because there's always one

Heuristic

Treat evaluation as a design input, not an afterthought. Start in Discovery, not at launch.

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