ADDIE Framework Tasks Checklist

Whether you are a novice or seasoned expert in the Instructional Systems Design arena, you have probably heard of the ADDIE approach to learning development. This approach is comprised of milestones that enable you to Analyze, Design, Develop, Implement and Evaluate training programs. In other words, it provides a roadmap for the entire training development process from "What do our people need to learn?" to "Did the learners get what they needed?"

Within each milestone of the ADDIE approach, there are several tasks you should perform to ensure effectiveness of your training program. Each milestone also involves creating one or more deliverables that report your progress and findings. *It's important to note that ADDIE should be viewed as an iterative approach with some tasks repeated throughout the process.*

Use the following pages of this step-by-step checklist to map out a successful, effective training program.

Phase	Tasks
Analyze	☐ Clarify organizational goals and objectives.
	☐ Identify the business concerns.
	☐ Identify performance problems related to those concerns.
	☐ Verify the need for training.
	☐ Determine the target training population, program entry requirements, participant characteristics and special needs.
	☐ Determine extent of training participant knowledge/skill assessment required.
	☐ Perform a task analysis: determine the tasks currently performed by target participants, steps to perform the tasks, and skills needed to perform the tasks.
	☐ Identify the level of performance required following the training and compare to existing performance.
	☐ Identify and communicate objectives based on task analysis results: terminal and enabling learning objectives.
	☐ Determine strategies for transferring learned skills to the workplace.
	☐ Define training administration requirements.
	☐ Detail project risks, opportunities and assumptions.
	☐ Investigate constraints in implementing the program, including technological, budget, timing and duration.
	☐ Estimate program design, development, implementation and evaluation costs, effort required and schedule.

	☐ Interview and select training vendors/trainers.
	☐ Quantify program design, development, implementation and evaluation costs and effort required.
	☐ Agree on the scope of the training program.
Resulting Analysis Phase Documentation (if desired)	Training Needs Analysis Report Task Analysis Report Findings Report Project Plan
Design	☐ Determine program structure and sequence.
	☐ Determine program duration and pace.
	☐ Decide program format and mode of delivery.
	☐ Identify practice conditions for training modules.
	☐ Specify types of participant assessments and assessment conditions.
	☐ Determine program evaluation methodology, data collection methods, timing and reporting formats.
	☐ Define implementation and training administration requirements.
Resulting Design Phase Documentation (if desired)	High Level Design Document Detailed Design Document Prototypes
Develop	☐ Develop communication plans and materials.
	☐ Develop session plans, facilitator guides, participant guides, trainer and participant resources, and job aids.
	☐ For eLearning, develop storyboards, narration scripts, and initial/remaining modules.
	☐ Develop coaching/mentoring guides and resources.
	☐ Develop participant assessments.
	☐ Develop project and program evaluation instruments.
	☐ Conduct pilot program to test that program meets client requirements.
Resulting Develop Phase Documentation (if desired)	Communication plan Session plans, facilitator guides, participant guides and resources Trainer materials Job aids

	Participant assessments
Implement	☐ Roll out program communications to stakeholders.
	☐ Produce program materials and aids.
	☐ Install technology infrastructure and services.
	☐ Set up administrative databases and systems.
	☐ Prepare coaches/mentors/facilitators.
	☐ Book venue, accommodation and travel arrangements.
	☐ Set up venue and accommodation.
	☐ Schedule participants.
	☐ Conduct training sessions.
	☐ Implement training transfer strategies.
	☐ Conduct participant assessments.
	☐ Collect participant feedback.
Resulting Implement Phase Documentation (if desired)	Completed participant assessments Completed attendance forms Completed participant feedback forms
Evaluate	☐ Collect training program evaluation data.
	☐ Collect project evaluation data.
	☐ Review training program performance (number of employees trained, percent participants passed, participant satisfaction).
	☐ Review project performance (cost, schedule, scope, stakeholder satisfaction, project team satisfaction).
	☐ Report program and project performance results.
Resulting Evaluate Phase Documentation (if desired)	Program evaluations Program Evaluation Report Lessons Learned Report