

Building an Instructional Design Roadmap



A roadmap translates learning strategy into sequenced, resourced, measurable delivery



Not the same artifact as a learning strategy or a single project plan



Scope: audience segments, skills, modalities, schedule, budget, evaluation — on one shared page



The alignment and governance instrument for ID leads, programme managers, producers, and SMEs



Core inputs: business goals, competency models, learner and performance data, real production capacity



Typical artifacts: one-page plan, multi-quarter view, production calendar, RACI matrix



Why Roadmaps Fail and What Changes in 2026

FROM A STALLED COURSE PRODUCTION QUEUE



TO A CONNECTED CAPABILITY SYSTEM



Diagnose before you design —
no confirmed gap, no roadmap



ID shifted from production
function to strategic differentiator



Skills-based capability building
replaces one-off courses



Modular content 'ingredients'
are reused across roles and contexts



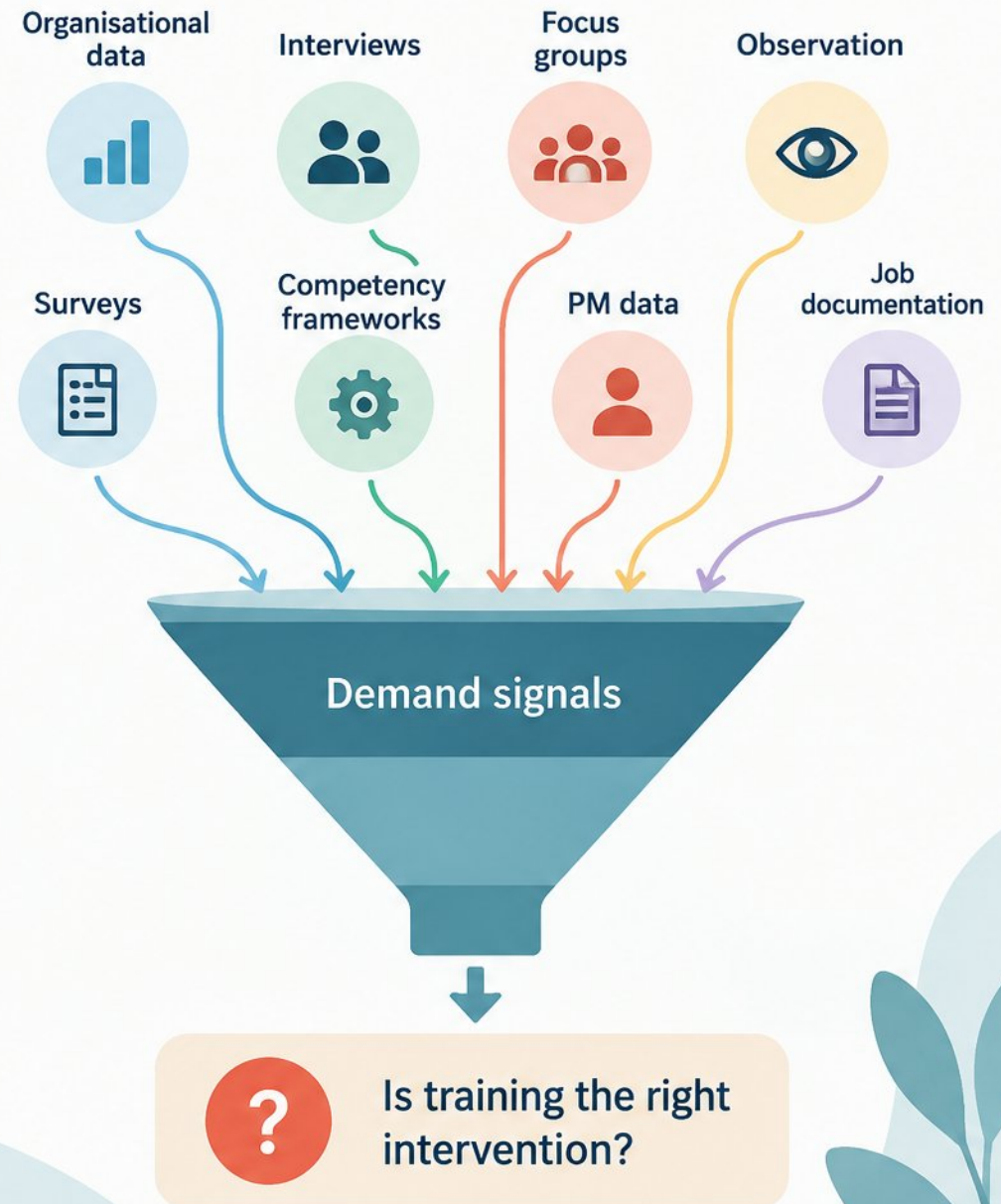
Practice-first design and in-workflow
performance support are baseline



Minimum viable measurement: one reaction
question, one pre/post scenario, one day-30
manager conversation

Business Drivers and Capability Demand Signals

- 1 Anchor to enterprise priorities needing new capability or behavior change
- 2 Distinguish ongoing learning needs analysis from one-off training needs analysis
- 3 Collect demand from data, interviews, focus groups, observation, surveys
- 4 Assess at organisation, occupational, and individual levels before deciding
- 5 Test whether training is the right intervention — knowledge, skill, motivation, environment differ



Defining Success Measures Before You Draft Anything



Start at Level 4 results, work backward to behavior, learning, reaction



Agree leading indicators with the sponsor as early progress signals



Run a return-on-expectations kickoff before any design begins



Name critical on-the-job behaviors with stakeholders, not for them



Confirm baseline data exists, or assign someone to collect it

Plan with clarity.
Design with purpose.



Core Components of a High-Quality Roadmap

Essential elements

-  objectives
-  audience
-  modalities
-  milestones
-  ownership
-  dependencies
-  communication plan

One-page canvas



Additional roadmap elements

-  Add timeline with named milestones, team, tools, and risk assessment
-  Sequence: quick wins first, then foundational skills, then iterative releases
-  Embed risk, contingency, and review cadence in the roadmap itself



Choosing Delivery Model and Design Approach

Match your context, goals and constraints to the right approach.

ADDIE



- ADDIE: structured large-scale programmes needing documentation and phase sign-off

SAM



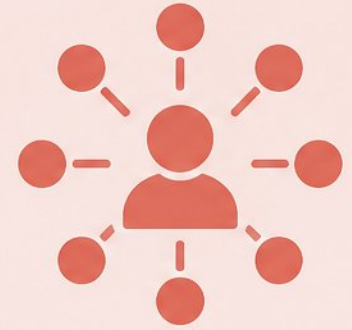
- SAM: fast-changing content, short timelines, rapid prototyping in iterative cycles

Dick & Carey



- Dick & Carey: compliance and high-stakes regulatory work with audit-aligned goals, objectives, assessments

Gagné's Nine Events



- Gagné's Nine Events: microstructure for individual eLearning units within any macro model



Planning benchmarks:

traditional 4–12 months, rapid 4–12 weeks, AI-accelerated 2–8 weeks

Scoping and Prioritizing the Learning Portfolio



Roadmap = managed set of investments, not a catalog of requests



Each initiative tied to a workforce need and business contribution



Score consistently: alignment, audience, risk, urgency, impact, effort, confidence



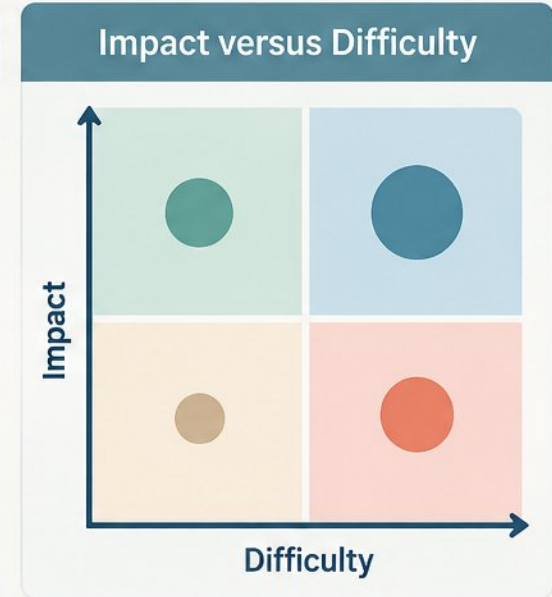
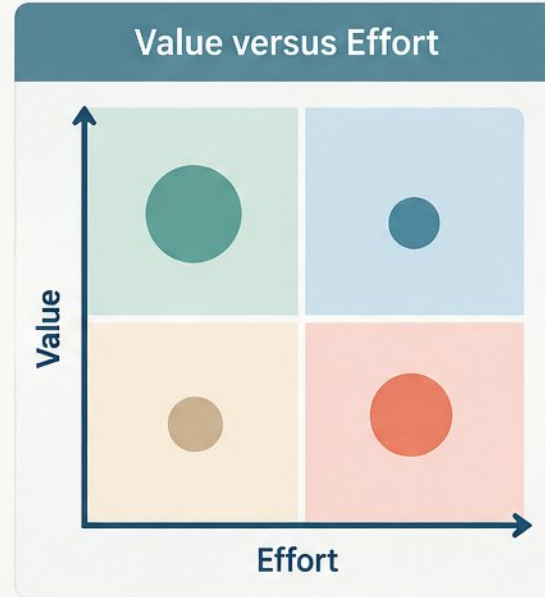
Value-versus-effort and impact-versus-difficulty grids triage long lists fast



RICE and WSJF sequence work; MoSCoW draws the release boundary

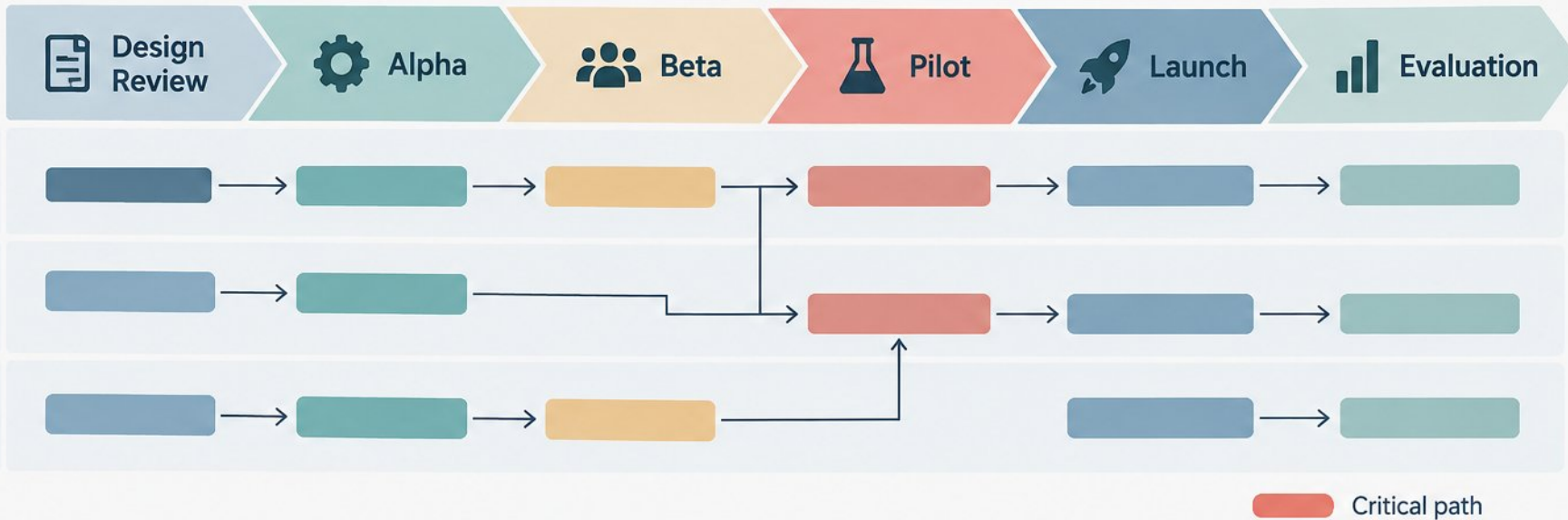


Make trade-offs explicit: name what will be delayed, reduced, or stopped



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Sequencing, Phasing, and Milestone Planning



Define phase gates: design review, alpha, beta, pilot, launch, evaluation



SAM2 milestones: Savvy Start, design proof, alpha, beta, gold release



Map dependencies and critical path; avoid double-booking SME review capacity



Buffer review cycles and pilot feedback against fixed compliance deadlines



Set exit criteria up front: review rounds and definition of "done"



PLAN
ALIGN
DELIVER

Roles, Responsibilities, and Capacity Planning

Deliverables	ID Lead	Programme Manager	Producer	SME	Media	Tech	QA
Objectives and assessment blueprint	A	C	I	R	I	I	I
Content development	R	C	A	C	C	I	I
Media production	I	C	R	C	A	C	I
Technical build	I	C	C	I	C	A	C
Review and approval	C	R	C	C	I	C	A
Release sign-off	I	C	I	I	I	C	A



RACI or RASCI: one accountable owner per task



Map roles to deliverables, not job titles



ID owns objectives and assessment blueprint; QA owns release sign-off



Estimate effort beyond production: SME time, approvals, localisation, support



Reserve capacity for unplanned demand via monthly intake review



Agree SME availability and review cadence in writing at kickoff

Capacity Planning

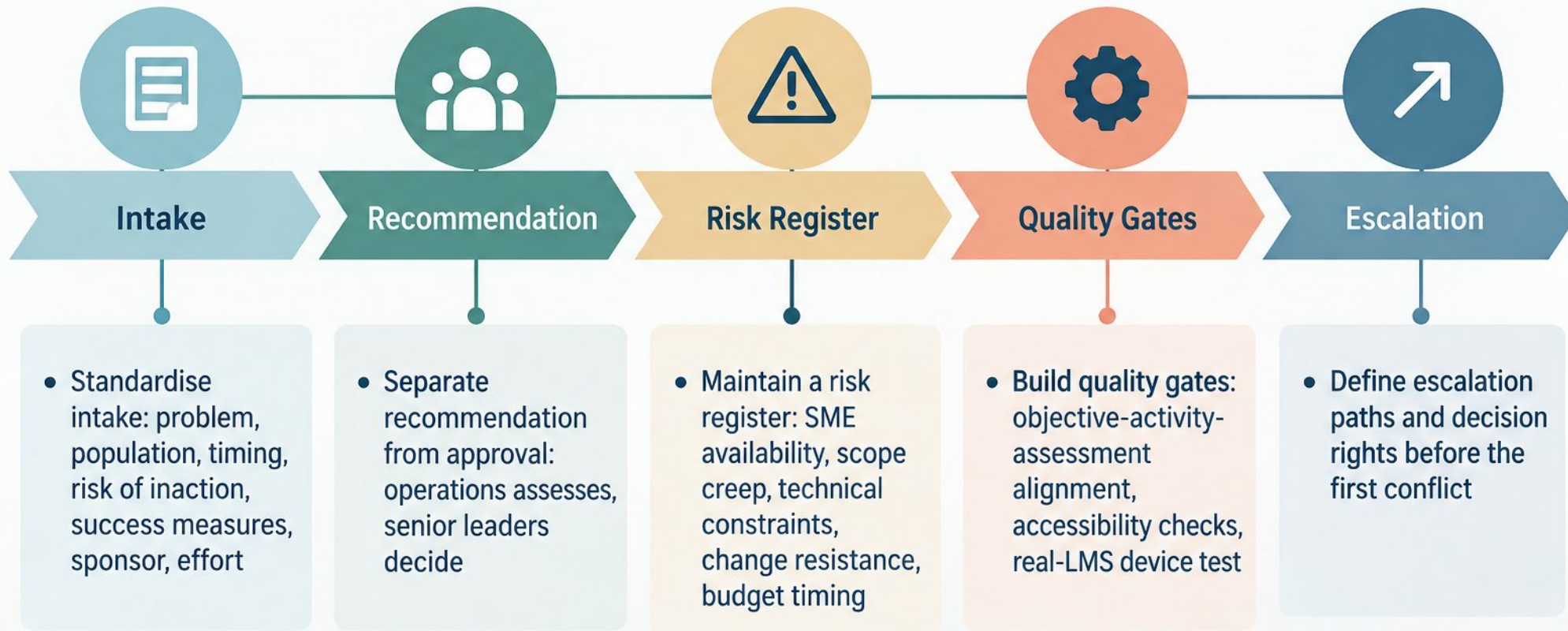


SME Availability



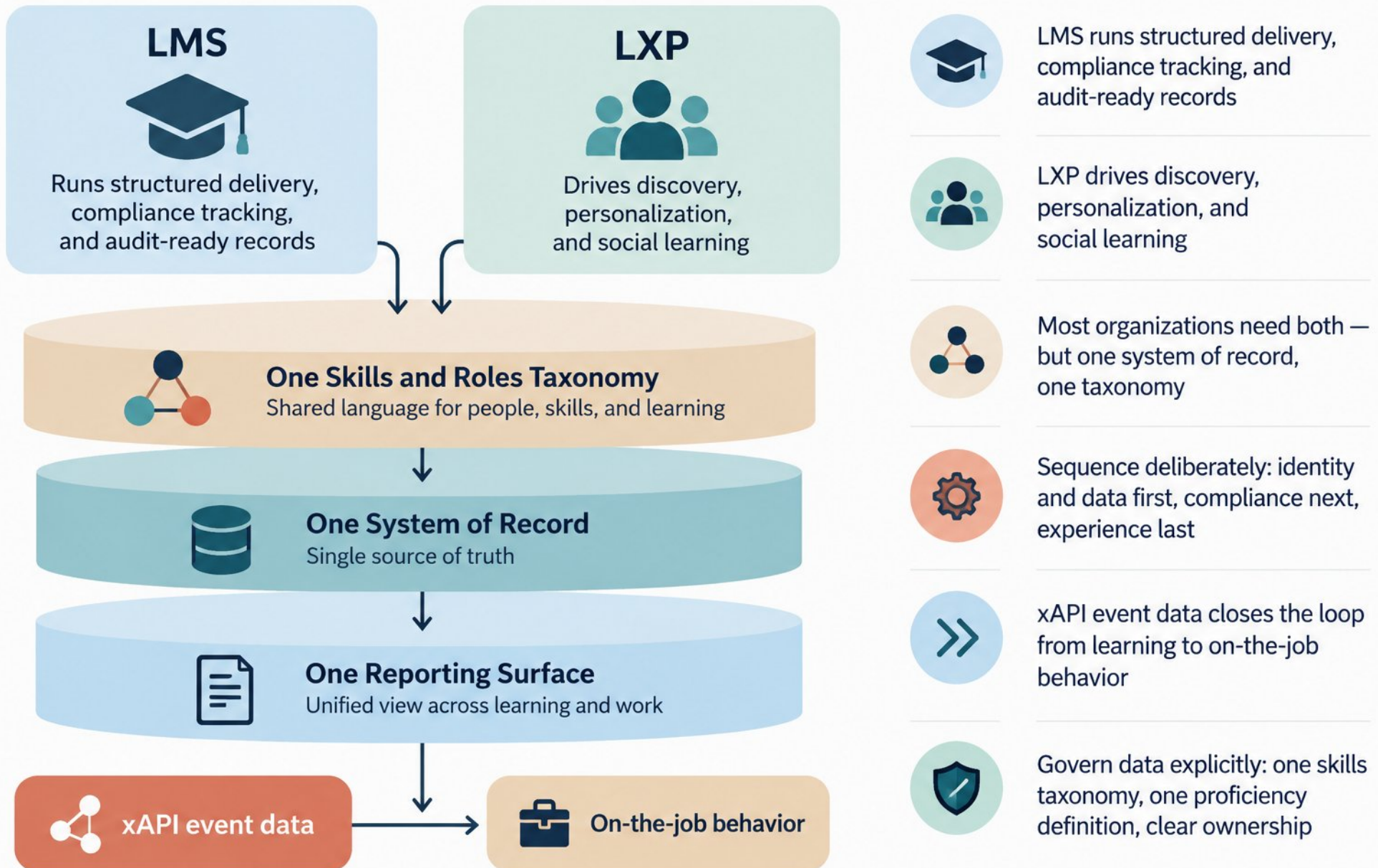
Governance, Risk, and Quality Gates

From ideas
to impact
with discipline



CLEARER PATHS.
STRONGER OUTCOMES.

Tools, Data, and a Single Source of Truth



Communication, Stakeholder Alignment, and Change Management

People. Alignment. Lasting Change.



Use ADKAR as a diagnostic: awareness, desire, knowledge, ability, reinforcement



Find the earliest unmet element — the barrier point — and focus support there



People managers and senior leaders are the faces of change; equip them to lead



Build a comms plan with dates, channels, and owners for each audience

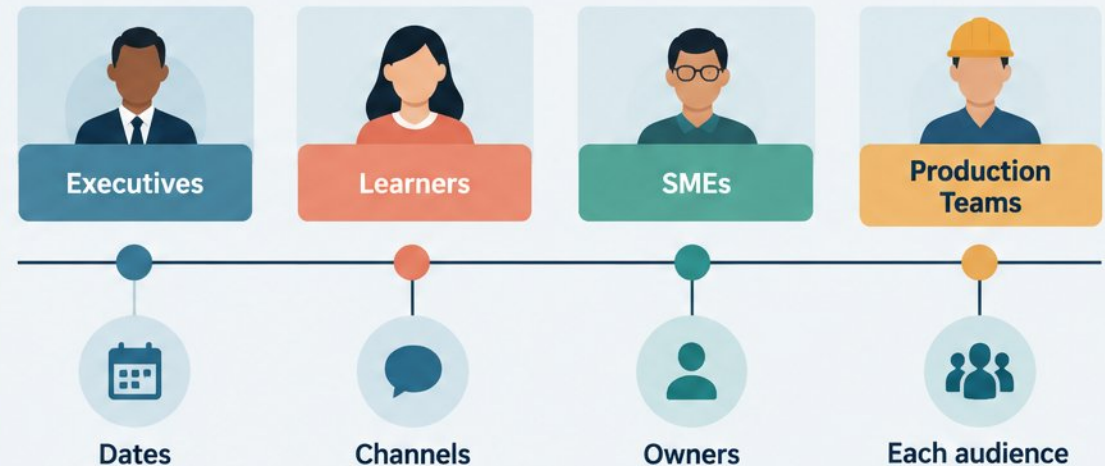


Plan reinforcement from the start: recognition, dashboards, refreshers, coaching

ADKAR Diagnostic



Communications Plan



Measure → Learn → Redesign

Review Cadence and Course Correction

REVIEW
LEARN
ADAPT
DELIVER



Monthly operational review: scope changes, blocked dependencies, capacity, budget variance



Quarterly strategic review: does the portfolio still match business priorities?



Green means on track against agreed scope, timing, and resourcing — not effort



At-risk work needs visible options: add capacity, reduce scope, re-time, or stop



Track leading indicators against the kickoff baseline; report in the sponsor's format



30/60/90-day follow-ups test whether critical behaviors changed on the job

A CLEARER PATH
TO WHAT'S NEXT

Continuous Improvement and the Next Roadmap Cycle



Build the evaluation plan during design, not after launch



Levels 3 and 4 can't be retrofitted cleanly



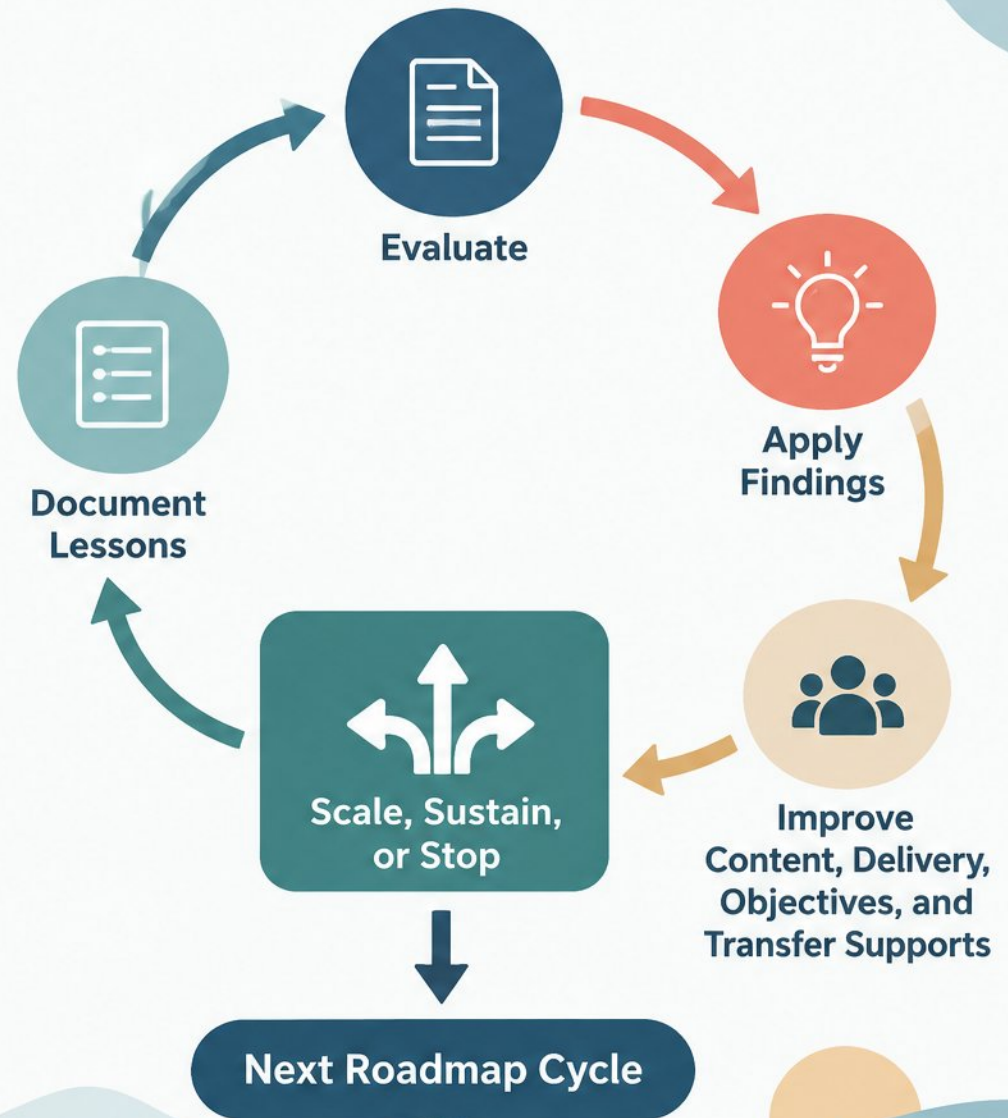
Fix content, delivery, objectives, and transfer supports from findings



Scale, sustain, or stop — and retire programmes that no longer fit



Document lessons while fresh; schedule content review dates



PersonWise.

PersonWise • AI digital-human course platform



Scan the code or click anywhere to watch this course live, with voice Q&A

personwise.ai/t/c8c4141d/public