Synapsys

Test for Success: How and Why to Test for Learning Designers

Maire Smith

10 September 2025

TAHU IGNITE
NZATD CONFERENCE 2025

Level 1, 10 Courtenay Place
Wellington 6021
New Zealand

PO Box 28
Lyttelton 8082

+64 4 801 8478
info@synapsys.co.nz

learn to transform

Table of contents

Ways to test e-learning 2
Ways to test workshops 3
Readings: Testing and piloting learning 4

Ways to test e-learning

Method	Time	People	Good practice guidance
Error logging and technical performance Monitor for glitches, slow loads, and compatibility issues.	Short	Developer or tech tester	https://elearningindustry.com/the-eight-step-troubleshooting-model-for-elearning The 8-step troubleshooting model provides a structured approach to identify and resolve issues in eLearning systems.
Data review (LMS analytics, quiz results) Analyse data to check engagement and knowledge gaps.	Medium	Analyst or L&D team	https://www.chameleoncreator.com/analytics An easy to follow tour that shows what you can do with data to improve your understanding of how people interact with your e-learning modules.
Peer review of content and structure SMEs assess clarity and instructional flow.	Medium	1–3 reviewers	https://community.articulate.com/blog/articles/your-handy-e-learning-course-review-checklist/1084445 A solid basic guide for peer reviewing with a focus on functionality checking https://www.unomaha.edu/faculty-support/professional-dev/peerreview_onlinecourses_guide.pdf A guide that focuses more on learning experience quality
A/B testing of versions Compare two versions for performance.	Medium –Long	L&D team, learners	https://www.nngroup.com/articles/ab-testing/ Guides best practices for comparing two versions to test effectiveness.
Usability testing with learners Observe learners navigating the module.	Medium –Long	Test facilitator + 2–5 learners	https://digital.gov/event/2018/06/14/usability-testing-with-steve-krug/ Provides step-by-step instructions for conducting usability tests.
Think-aloud protocol during testing Ask users to verbalise thoughts while interacting.	Medium	1–2 testers	https://www.nngroup.com/articles/thinking-aloud-the-1-usability-tool/ Details how think-aloud testing uncovers usability issues quickly.
Alpha/beta pilot groups Trial full experience with early users.	Long	Target learners (5–15)	https://elearningindustry.com/what-are-alpha-beta-gold-stages-in-elearning-content-development Describes how to use the SAM model to iteratively test and refine e-learning. https://www.researchgate.net/publication/237773207_Training_The_Success_Case_Method_A_Strategic_Evaluation_Approach_to_Increasing_the_Value_and_Effect_of Describes the Success Case Method.

Ways to test workshops

Method	Time	Personnel	Good practice guidance
Tech checks and dry runs Rehearse to confirm flow, content/timing, and tech setup.	Short	Facilitator + producer	https://www.csps-efpc.gc.ca/Tools/jobaids/dry-run-eng.aspx A detailed guide to how to get the most out of your dry run
Chat log or transcript analysis Review chats to assess engagement and clarity.	Medium	1 reviewer	https://www.coursensu.com/methods/chat-transcript-or-conversation-history A great summary of how to use a chat log or transcript as a tool to get insight into your learning intervention
Co-hosting with support feedback Include colleagues to monitor and provide feedback.	Medium	Facilitator + co-host	https://www.education.vic.gov.au/Documents/school/teachers/teachingresources/practice/Peer_observation_feedback_and_reflection_practical_guide_for_teachers.pdf A guide for teachers on peer observation and feedback – very applicable to co-facilitator feedback
Participant feedback surveys Gather post-session feedback.	Short	All participants	https://www.thinkific.com/blog/training-survey-questions/ Model questions and good practice guidance https://www.questionpro.com/blog/microsoft-forms-vs-surveymonkey-complete-analysis Key facts about survey platforms
Pilot with real participants Run with a test audience for feedback.	Long	Target learners (10–20)	https://www.researchgate.net/publication/237773207_Training_The_Success_Case_Method_A_Strategic_Evaluation_Approach_to_Increasing_the_Value_and_Effect_of Describes the Success Case Method.
Polling or live reactions Assess engagement in real time.	Short	Facilitator + platform tools	12 Ways to Evaluate Reactions: Level 1 Training Evaluation Describes ways to use interactive polling to check clarity and engagement in real time.

Readings: Testing and piloting learning

Michael Allen – SAM

Dr Michael Allen, creator of Authorware and founder of Allen Interactions, is known for championing iterative, agile approaches to instructional design through SAM (the Successive Approximation Model). His main message: integrate testing into the design process from the start, using rapid prototyping and representative pilots at alpha, beta, and gold stages to uncover and fix problems before rollout.

- Allen, M. W. (2020). *Leaving ADDIE for SAM Moving Beyond Content-Centered Design.*
- Sites, R., and Green, A. (2014). *Leaving ADDIE for SAM Field Guide: Guidelines and Templates for Developing the Best Learning Experiences*. Association for Talent Development
- Allen, M. W. (2012). *Leaving ADDIE for SAM: An Agile Model for Developing the Best Learning Experiences*. American Society for Training & Development.

Robert Brinkerhoff – SCM

Robert Brinkerhoff is best known for the Success Case Method, a pragmatic approach to evaluation that focuses on identifying and learning from the most and least successful cases in a pilot. He advocates using these findings to refine learning design before scaling.

- Brinkerhoff, R. O. (2005). 'The Success Case Method: A Strategic Evaluation Approach to Increasing the Value and Effect of Training', *Advances in Developing Human Resources,* 7:86, DOI: 10.1177/1523422304272172. (PDF available at: https://tinyurl.com/NZATD-BrSCM)
- Brinkerhoff, R. O. (2003). *The Success Case Method: Find Out Quickly What's Working and What's Not*. Berrett-Koehler.

Julie Dirksen – LXD Toolkit

Julie Dirksen makes learning science practical by designing for measurable behaviour change. Dirksen advocates small-scale trials and observational testing – watching real learners interact with a design to see where engagement or understanding breaks down. She stresses starting with clear, observable objectives and validating them in context, and she frequently adapts UX testing techniques (like think-aloud protocols) for learning environments. On her website, she shares a range of learning experience design (LXD) tools.

- Dirksen, J. (2016). *Design for How People Learn* (2nd ed.). New Riders.
- Dirksen, J. User Experience Design for Learning: https://tinyurl.com/NZATD-UXTools

Donald and James Kirkpatrick – Kirkpatrick Model

Donald and James Kirkpatrick developed the Kirkpatrick Model, a widely used framework for evaluating training at four levels: reaction, learning, behaviour, and results. They emphasise piloting and evaluation at each level to ensure the design leads to measurable performance improvement. (Note: If you think Kirkpatrick is a triangle, check out the white paper!)

- Jim Kirkpatrick, J, and Kirkpatrick, W. K. (2022) An Introduction to The New World Kirkpatrick® Model. White paper: https://tinyurl.com/NZATD-NWKM
- Kirkpatrick, D. L., & Kirkpatrick, J. D. (2006). *Evaluating Training Programs: The Four Levels* (3rd ed.). Berrett-Koehler.

Cathy Moore – Action Mapping

Cathy Moore is the creator of Action Mapping, a method for designing training that focuses firmly on workplace behaviour change. Her approach to piloting is to build low-fidelity prototypes of practice activities early, test them with learners for realism and relevance, and refine iteratively until they feel authentic and useful. Moore's book has clearly written examples of how she uses prototypes within her design phase.

- Moore, C. (2017). *Map It: The Hands-on Guide to Strategic Training Design*. Cathymoore.com.

Jakob Nielsen and Don Norman – NN/g

Jakob Nielsen and Don Norman founded the Nielsen Norman Group, now NN/g, a leading UX research organisation. They promote frequent, lightweight qualitative tests with small groups of representative users, supplemented by heuristic reviews, as the fastest way to catch design flaws. Their methods adapt well to learning design pilots.

- Nielsen Norman Group. *Usability Research Articles and Training:* www.nngroup.com/articles/

Will Thalheimer - LTEM

Will Thalheimer is a workplace learning expert who developed the Learning-Transfer Evaluation Model (LTEM) and *Performance-Focused Learner Surveys*. His key message: pilots should measure real-world performance outcomes, not just learner satisfaction or completion rates, and feedback should be specific enough to inform immediate design improvements.

- Thalheimer, W. (2024). The Learning-Transfer Evaluation Model: Sending Messages and Nudging Evidence-Informed Thinking to Enable Learning Effectiveness. White paper: https://tinyurl.com/NZATD-LTEM (Note: he shares his feelings about the value of all the other main models in this!)
- Thalheimer, W. (2018). *Performance-Focused Learner Surveys: Using Distinctive Question Types to Evaluate Training*. Work-Learning Research.