

Instructional Design for Multicultural Audiences

Adapting instructional design methods and principles for multicultural audiences at home and abroad

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Designing an effective training is an art, not a science. In today's world of instructor-led, computer-based, and self-directed trainings—and all the blended solutions in between—an instructional designer must strike a delicate balance between the learner's needs, expectations in a learning environment, and the myriad of methodologies and technologies to enable that learning.

Add cultural differences to the training mix and it becomes an even more complex task, as the instructional designer may no longer be certain of the learner's needs and expectations in a learning environment. Such differences are present not only in international locations but often right here at home in what has become a culturally diverse American workforce.

Understanding culture and its impact on instructional design allows designers to leverage this knowledge and improve the overall success of both domestic and international learning initiatives, whether starting at square one with a new tool or modifying (*localizing*) an existing tool.

How learning behaviors vary across cultures

When we consider different *cultural learning styles*, we are not considering the array of cognitive learning styles such as those outlined by Kolb¹, but rather the needs and expectations that are unique across cultures.

The *cultural iceberg* is a metaphor for understanding cultural differences. Behaviors, such as those observed in the classroom, are merely the “tip of the iceberg” and reflect a deeper set of values and attitudes that lie further below the surface. These values and attitudes are instilled – and reinforced – by institutions such as the family, societal norms, and the educational system the learner grew up in.

Tina Thompson, Director of Learning and Development with Applied Systems, comments: “People come into the training thinking that what they value will be the same as what their co-workers and team value. They're from different generations, different backgrounds, and bring different experiences. The learners themselves realize that,

“Wow, we don't have many of the same values and we see things differently...and that's actually great! It enhances our work to bring different viewpoints to the table.”

Some of the key cultural values with impact in instructional design include hierarchy, collectivism, formality, relationships, and high context communications.

Hierarchy:

A culture that values hierarchy believes that people are not always “equal” in every situation, be it for the status ascribed to their position in the organization or society, or for their achievements. This inherent “distance” between people valuing hierarchy is seen as normal and often desirable. Roles are thought to provide order and one is assumed to be trustworthy and credible only when one understands his/her role compared to others. Thus, a learner who values hierarchy may not be comfortable with an instructor who, rather than demanding respect for his position and experience as a trainer, attempts to be “an equal.” Similarly, learners who find themselves in a classroom with their superiors may be uncomfortable interacting with those superiors, whether participating in a learning activity together or in a large brainstorming session. It is important to note that the superiors will feel equally uneasy in this environment. Cassandra Sheffield, a General Education Instructor at a downtown Chicago college, remembers just such an example, “Once, my ‘I'm at the same level as you are’ approach backfired on me. The students were looking for someone who was more of an authoritative figure and [they] didn't respond well to the self-directed learning. I had to learn when to step up to more of an authoritative role.”

Example ID implication: *What type of interaction are you expecting in the group dynamic? Do the learning activities involve extensive group interaction in what will likely be a “mixed” group? Is the trainer's role explicitly defined as “facilitator” rather than “instructor”?*

Collectivism:

A culture that values collectivism sees the group as a whole as being more important than each individual member. Success is group success, not personal success. Group harmony is critical.

Those who act with only their own interests at heart and those who stand out from the group are not respected and generally ineffective. A learner who values collectivism considers herself a part of the classroom group and may be uncomfortable in planned training activities that require her to “stand out” or “show off.” Kathy Orms, Director of OD with Loyola University Medical Center comments, “Americans are open and friendly and want to share things about themselves right away. That doesn't always happen in other cultures, so if you want it, you've got to start with low-threat activities and very gradually work up to a point where each person fully participates by himself.”

Example ID implication: *What level of individual performance are you expecting in each training module?*

Formality:

A culture that values formality believes that certain situations require certain protocols. A learner who values formality will expect the trainer, and the training materials, to have a certain level of professionalism. Any informality in the learning environment may be seen as a lack of professionalism. Mickey Steffeny, Communication and Training Coordinator with Archer Daniels Midland, understands this dimension very well: “In one of our first trainings in Europe, we used a baseball theme, just like our domestic training. We took it over and received a less-than-warm reception to using such an informal American theme. We have had to backpedal to regain credibility.”

Example ID Implication: *Are the themes of the learning tool sufficiently professional? Do the materials reflect the importance of the training?*

Relationships:

A culture that values relationships sees human interaction as more important than the impersonal task we find ourselves charged with. A learner who values relationships will see the instructor and his fellow learners as more important than any time constraints, task requirements, or impersonal rules and regulations. They may also consider the relationship so important that they do not see the “benefit” of explicit and overt peer criticism.

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The concept of “saving face” (avoiding embarrassment for you and for those around you) demonstrates the ultimate importance of maintaining harmonious relationships. Christine Swanstrom, a Sr. Instructional Designer with United Airlines, explains the importance of relationships with audiences overseas: “We expanded a 2-day training to 3 days. As we progressed through the program’s 3 days, we added more group activities...by the end, large group discussions and sharing were part of the norm of the class. I believe this was due to the continuous relationship building that was a part of the design of the class.”

Example ID implication: *Is the training schedule too rigid to accommodate changes, which may arise out of the training class’ relationship (i.e., discussions, etc.)? Are learners expected to give each other feedback? Do role plays or activities require participants to “lose face,” albeit only simulated?*

High Context Communication:

A culture that values high context communication believes that the *way* we communicate often carries more meaning than just the words themselves. A learner who values high context communication will expect the trainer to speak holistically and avoid paring every concept down to the most basic explanation. They may also expect discussions to be broader and deeper. Reeti Nair, President of Aligna, Inc., comments, “People who are raised in a low context culture want to drive right to the bottom line. People from high-context cultures want to first talk about the abstract – the esoteric – before actually getting into the meat of it. When designing training, you’ve got to meet the needs of both groups.”

Example ID Implication: *How much time is built into the training for discussion? Are explanations and dialogs too brief? Is sufficient background information presented to satisfy a high context learner?*

Considerations for culturally-aware instructional design

Adapting a training for a *multi-cultural* audience is significantly more difficult than adapting it for a discrete cultural group such as those found at international locations. Many of the following considerations for ID are applicable in both situations. While some may argue the inefficacy of attempting to assume a different cultural viewpoint when doing ID work, in a world of limited resources and options, it often remains as the most practical and viable method for building learning tools for diverse learners.²

The process of modifying the instructional design process to incorporate cultural considerations requires a focus on many stages in the design process. While we have outlined considerations for many aspects of the training, not every area needs to be considered in every case. Informational and awareness-building modules, for example, may require few modifications aside from trainer selection and preparation. Skill-building and motivational modules, on the other hand, may require significant modifications.

Needs Analysis

Do investigative techniques used with the average American work as effectively in the target culture? For example, are workers as willing to readily admit areas of weakness or areas of improvement because it would cause them to lose face? Does your point of contact for the needs analysis understand her learners’ *cultural* learning styles?

Objective Setting

How will target culture trainees react to the types of objectives you have designed? Do purely behavioral objectives lack any “theoretical understanding” imperative to cultures that consider training an opportunity for both thinking and acting? Do your objectives threaten trainees with “failure” if they are not able to fully meet the competencies?

Testing & Evaluating Performance

Do your methods for evaluating achievement take cultural differences into consideration? For example, peer evaluations of post-learning performance in the classroom may be ineffective if peers are not able to provide proper constructive feedback or are unable to criticize and judge their peers (face-saving).

Content

Does the content reflect local behaviors, norms, and attitudes? For example, does your sales training speak specifically to local selling practices and expectations from clients/consumers? Do your case studies reflect the actual environment in which the trainees function? Tina Thompson has her own strategy for adapting international content: “I educate myself on local events and culture and intertwine their current events into the lessons. They love it when they see we’re trying to tap into their realities.”

Format

Do your methodologies put participants into uncomfortable situations? Are you asking line and managerial workers to collaborate or even switch roles to achieve a level of empathy, despite a hierarchical cultural attitude? Do your role plays go against the concepts of “conflict avoidance” common in many Asian cultures by asking participants to simulate a confrontation?

Materials

Do the materials reflect a multi-cultural perspective? Do the images, graphics, and scenarios reflect the target culture? Images of wholly-Caucasian American families or a wholly-Chinese workforce will immediately seem foreign to people from Africa or the Middle East and may diminish their faith in the training events’ applicability for them.

Delivery

Does your delivery method speak to all participants? A trainer unfamiliar with local training norms may be unable to diagnose problems or, even worse, may misdiagnose situations leading to further problems.

Evaluation

How does the target culture treat the evaluation, and therefore how do we interpret the results? While some Americans may be openly critical of each other, Thais may give everything a 10 to avoid criticizing or embarrassing anyone (including the trainer). Are there methods for soliciting comments and evaluations in a less formal, yet structured, way?

Who needs to be involved?

It is not always possible, as instructional designers, to be cultural experts as well. Relying on the trainer to improve the training during the delivery phase is not always effective. The best approach is to incorporate cultural aspects directly into the training design phase.

When possible, consulting with target-culture HR professionals will allow you to identify areas of strength and weakness in your training strategy, from initial needs analysis up through evaluation. At United Airlines, Christine Swanstrom notes, “We were expanding globally, so we brought in external cultural consultants to look at our training from a theoretical perspective, while leveraging our own international SMEs for the direct application to job tasks.”

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Another option is to test the learning tool with a diverse focus group. According to Mickey Steffeny, “In a perfect world, I could pull together a cross-cultural and cross-sectional focus group to find where the gaps are in my training.” Reeti Nair also includes target trainees in the process and asks, frankly, “Where would you feel uncomfortable?” Ray Narducy, the manager of OD for Ace Hardware, uses the principle of buy-in by having others involved in creating the training. “We get supervisors involved in the training design and ask what will work and what won’t work for their group.” Kathy Orms uses a similar process: “I find the perceived leader of the training group, as well as the ‘named’ leader, and include them both in the assessment and planning sessions.”

The localization of a training is most easily accomplished with the advice and input of the diverse group, but you may also benefit from various others, including:

Translator:

If materials are for non-English speakers, all training materials may need to be translated. This translation must be done by an experienced translator; using bilingual colleagues unskilled in translation can result in extra hours of effort and a poor adaptation, which may or may not capture the essence of the training.

Cultural Subject Matter Expert (SME):

The Cultural SME understands the behaviors and attitudes of the target culture and can provide input and feedback regarding proposed adaptations. External cultural consultants experienced with training are one source of cultural SMEs. In addition, internal focus groups and key contacts can also provide insight. One caveat, according to Mickey Steffeny, is, “Don’t assume that a secretary is going to be capable of evaluating a training for managers.”

Local Content SME:

In cases where part of the localization includes localization of content, you may need a local SME to provide you with the appropriate content.

Local Trainer:

The local trainer is a training professional with experience in the local culture and with an ability to understand your needs and expectations. If outsourced, you may need to bring the trainer up to speed on your organization’s specific approach to the training content.

Adapting an existing learning tool

Adaptation may also take place after design is complete. The term *localization* is most often heard in the context of consumer products, especially software, which are adapted for export to foreign markets. Through the process of localization, the product’s design specifications and functionality, among other things, are adapted to meet local user needs in the target market. Similarly, *training localization is the process of adapting a training originally designed for (and by) one cultural group for delivery to another cultural group.*

The extent of adaptation needed in a post-design localization is variable. It may include modifications to any or all aspects of the training including learning objectives, methodologies, content, and cases and specific examples; it may also take the form of translation and/or delivery modifications.

The Business Case

If the ultimate role of a good instructional designer is to create an effective learning tool, the qualitative benefits of adapting the design to a distinct cultural group’s needs are threefold. First, the trainees are better off because they are able to acquire the knowledge and skills more effectively. The organization is better off because its learning goals are met for more learners. Lastly, we as instructional designers are better off because we have designed a more successful training that reflects our best efforts.

Unfortunately, instructional design for multicultural audiences typically requires additional resources. Convincing management of this need for more flexible time or budget constraints is not always an easy task.

Figure 1 allows you to conceptualize the qualitative benefits of a localized versus an unadapted domestic training. Note that as the target audience’s culture becomes increasingly different, the domestic version of the training provides lower results (be they measured in effectiveness, satisfaction, or financial impact). A localized version, while never reaching maximum effectiveness/satisfaction, as might be created by instructional designers native to the culture, allows you to maintain a markedly higher level.

The only point at which either of the trainings theoretically achieves maximum

effectiveness is when delivered directly to those who hold the same cultural values and learning environment norms as the designers. Regardless of the extent of localization, a localized version can only approach maximum effectiveness because there are always aspects of the original training design that are inherently different. Even a training designed by Americans for Americans at an American organization will lose a degree of effectiveness if presented to a neighboring organization where the organizational culture may be slightly different. A training that is effective at Apple may have a different impact on the same type of trainees at Microsoft. This difference is magnified when the differences are life-long cultural values. Estimating the level of cultural difference is not always easy, and most trainers and instructional designers often *underestimate*—particularly when they are unfamiliar with the differences that exist between learners of different cultures.

In addition to any hard criteria that may be established by training and development departments, other benefits can be expected from localized training. Most importantly, you can expect improved morale of local groups, who now feel the training is “theirs” and not simply an “import from headquarters.”

However you measure ROI, the basic presumption is that the short and long-term benefits of the training outweigh the current costs to the organization. A successful training initiative provides value to the organization in the form of additional knowledge and skills that contribute to improved performance. It would be erroneous to assume that a training designed for one cultural group would have the same impact as that designed for another. Without the same impact, any numeric figures used to represent the “benefit” to the organization would be overstated and thus ROI would be overstated. Adapting the process allows us to regain that value by regaining the desired impact.

Similarly, costs inherent in the adaptation process also impact ROI. Therefore, any initial evaluations of ROI would need to be adjusted for this increased investment. In summary, the improved effectiveness of the training contributes to a higher *return* while the additional resources and time needed to fully

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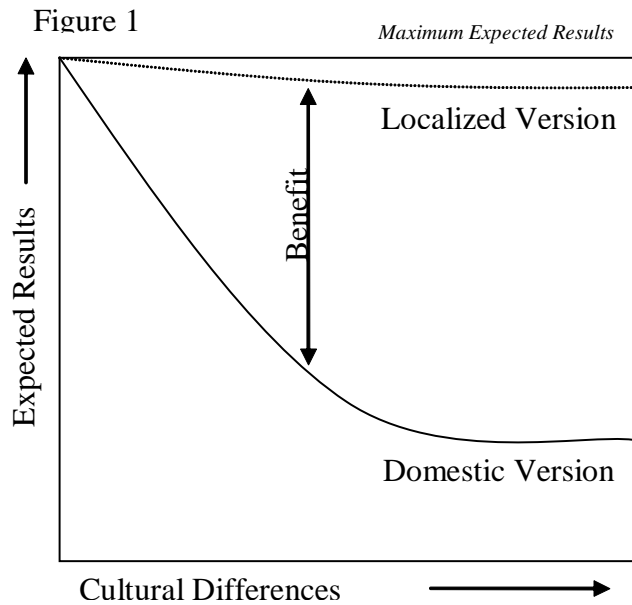
adapt the training may contribute to a greater *investment*.

Moving Forward

As organizations grow internationally and the American workforce continues to diversify, we as instructional designers and trainers must come to understand and leverage the cultural diversity that surrounds us.

¹ Kolb, D. A. (1984) *Experiential Learning*, Englewood Cliffs, NJ: Prentice Hall

² Henderson, Lyn (1996). Instructional design of interactive multimedia: a cultural critique. *Educational Technology Research and Development* 44 (4), 86-104.



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