

Formative Evaluation Techniques

Design Phase

Technique	What to Evaluate	Who Evaluates
1. High-level design approval	Learner analysis	Instructional designers Facilitators Subject-matter experts Sponsors (for approval)
	Task analysis	
	Learning goals	
	Module selection <ul style="list-style-type: none"> • Purpose • Alignment to learning goals • Delivery method • Duration 	
	Sequence of learning	
	Assessment plans	
	Evaluation plans: formative and summative	
	Deliverables	
	Maintenance plan	
2. Detailed design review	Learning goals and module alignment	Instructional designers Facilitators Subject-matter experts
	Module topics <ul style="list-style-type: none"> • Learning objectives and topic alignment • Content • Instructor directives • Learner directives • Content resources • Topic duration 	
	Final deliverables	
	Assessments	

Development Phase

Technique	What to Evaluate	Who Evaluates
3. Subject-Matter Expert walkthrough	<ul style="list-style-type: none"> • Content (includes tacit knowledge) • Module and topic Sequence • Exercises • Assessments 	Subject-matter experts (Should be new to the project with no prior involvement in the design or development)
4. Learner walkthrough	<ul style="list-style-type: none"> • Content • Module and topic Sequence • Exercises • Assessments 	Targeted audience reviewers (Should have various levels of experience)
5. Usability testing	<ul style="list-style-type: none"> • Content • Navigation • Interactivity • Exercises • Assessments 	Instructional designers Subject-matter experts Experienced users Actual learners
6. Technical editing	<ul style="list-style-type: none"> • Content • Exercises • Assessments Check for style guide compliance, clarity, readability, and cultural considerations	Technical editors
7. Small-group session	<ul style="list-style-type: none"> • Content delivery • Delivery timing • Technical editing • Exercises • Assessments (pre- and post-testing for comprehension and learning) 	Instructional designers Subject-matter experts Experienced users Actual learners Facilitators
8. Pilot	<ul style="list-style-type: none"> • Content delivery • Technical editing • Exercises • Assessments (pre- and post-testing for comprehension and learning) 	Learners from the targeted audience
9. Implementation Readiness approval	<ul style="list-style-type: none"> • Alignment with business and performance objectives • Content 	Sponsors Stakeholders Design team