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CASE STUDY

# From Blueprinting to Action Mapping

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**ABSTRACT**

This descriptive case study describes a collaboration between the Center for Continuing Education at Saskatchewan Polytechnic in Canada and an organization administering services to support Saskatchewan's health system. Its purpose was to provide foundational knowledge and skills in the workplace by creating accessible, engaging, and purpose-driven micro-credentials for adjudicators and others working in insurance companies across Canada. In the client's context, adjudicators are frontline staff responsible for administering group life, extended health care, dental, and disability income plans. The successful completion of the micro-credentials was driven by sustained client engagement during weekly virtual meetings and a shift from traditional course blueprinting to Action Mapping. This approach was enhanced by using Figma to visually represent the relationships among key design elements. This case study is particularly relevant for post-secondary institutions (PSIs) aiming to collaborate with industry partners on designing and developing learning solutions that address real-world workforce needs. It highlights a common challenge PSIs face when applying traditional design methods in industry contexts, outlines the criteria used to select a more suitable design approach, and provides illustrative examples. Ultimately, the study offers practical strategies to enhance collaboration with workplace learning clients by streamlining the design process and ensuring alignment with industry expectations.

**KEYWORDS**

action mapping, course blueprinting, Figma, workplace learning, post-secondary institutions, micro-credentials, instructional design

## 1 INTRODUCTION

### 1.1 The partnership

The Center for Continuing Education at Saskatchewan Polytechnic partnered with an organization that administers health services across Saskatchewan, Canada. The purpose was to provide foundational knowledge and skill development opportunities through a series of four asynchronous, self-paced online micro-credentials. Micro-credentials are defined by Saskatchewan Polytechnic as "short, focused learnings that accelerate your skills in a specific area" [1].

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A micro-credential typically comprises three micro-learnings, one for each learning outcome, each consisting of multiple lessons. Figure 1 illustrates the structure of a micro-credential

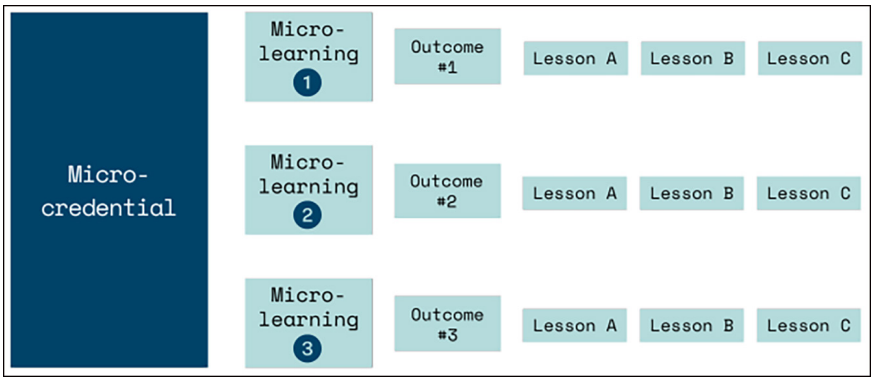


**Fig. 1.** Micro-credential structure

### 1.2 The project team

The project included five team members (see Table 1).

**Table 1.** Roles and responsibilities

| Role | Responsibility |
|---|---|
| Learning architect | Consult with the client, complete a learner analysis, identify preliminary learning outcomes, and review project deliverables. |
| Online curriculum developer | Conduct the design and development of micro-credentials in collaboration with the subject-matter expert/client. |
| Internal quality reviewer | Review instructional content to ensure compliance with internal design standards. |
| Client/subject-matter expert(s) | Provide and/or elaborate on instructional content and complete an expert review of the subject matter. |
| Client-side external reviewer | Validate the accuracy and authenticity of instructional content. |

## 2 INSTRUCTIONAL DESIGN CHALLENGE

As an online curriculum developer at a post-secondary institution, I typically collaborate with educators who are subject matter experts (SMEs) in their respective fields or disciplines. These SMEs appreciate the educational approach of outcome-based education (OBE) [2], [3], including the language of outcomes, learning objectives, activities and assessments, and the concept of Backward Design [4]. This background knowledge and the implicit understanding of how to prepare and organize instructional content expedite the design phase, of which Blueprinting (also known as course mapping) is a key component.

In contrast, the current project involved an industry-based SME who was unfamiliar with the language and conceptualizations of outcome-based education. Moreover, they were accustomed to thinking of learning as a way to bridge the gap between the current and desired work performance, rather than as a set of learning outcomes students were expected to attain during a course or as part of a broader program. This perspective aligns with a key aim of workplace learning, whereby

learning represents “an increased capacity to do the right thing at the right time” [5, p. 47] with the aim of improving organizational results [6].

Following an initial meeting with the SME to review learning outcomes and generate learning steps, activities, and assessments using the Blueprinting process, I was reminded of the distinction between education and training, as explained by Morrison et al. [7]. While both concern learning, they differ in purpose. Education prepares students to contribute to society, whereas workplace training focuses on ensuring that employees can perform specific tasks effectively. This distinction has practical implications for designers like me, as I realized clients bring their own conceptions of learning into the design phase, shaping how the process unfolds and influencing key design decisions. Evanick [8] notes that many instructional design best practices, such as developing learning objectives and aligning assessments, can be effectively transferred from higher education to industry contexts. While my experience generally supports this, I have found that the design process itself is less transferable. Although during earlier micro-credential projects I had had some success using the traditional Blueprinting process, commonly employed in post-secondary online course design, it proved misaligned with the needs of workplace training in this case.

Upon reflection, I realized that my previous success stemmed from a shared familiarity with the Blueprinting approach among myself and the post-secondary subject matter experts (SMEs) I typically worked with, rather than the inherent suitability of the method itself. This reflects a kind of institutional preference for familiar methods, in which the Blueprinting method is assumed to be the most suitable only because designers widely use it. However, the limitations of Blueprinting in the context of micro-credential development for industry clients became especially apparent when collaborating with a non-educator industry partner.

## 3 COURSE BLUEPRINTING AND NEW DESIGN APPROACH

This section contributes to the descriptive account of this project by outlining the components of the Blueprinting process, the criteria I used to identify a more effective design approach, the rationale for selecting Action Mapping as the alternative, along with an evaluation of how it successfully met the intended goals. The shift from Blueprinting to Action Mapping was necessary, as workplace learning demands a more agile and targeted design approach, one that aligns with industry conceptions of learning and addresses specific performance needs.

### 3.1 Blueprinting

The concept of Blueprinting is primarily grounded in Outcome-Based Education (OBE) and Backward Design, as conceptualized by Spady [3] and Wiggins and McTighe [4], respectively. According to Shipley [9] and Hejazi [10], OBE has been the dominant approach used for program and course development since the early 1990s. Defining features of OBE include the identification and development of learning outcomes, the alignment of these outcomes with activities, course materials, and assessments, and the use of assessments that focus on student attainment of learning outcomes. Spady [2] describes OBE as follows:

> “Outcomes-Based Education means clearly focusing and organizing everything in an educational system around what is essential for all students to be able to do successfully at the end of their learning experiences. This means

starting with a clear picture of what is important for students to be able to do, then organizing curriculum, instruction and assessment to make sure this learning ultimately happens" (p. 12).

Understanding by Design (UbD), synonymous with the backward design approach, is complementary to OBE. UbD offers a "conceptual framework" to "design or redesign any curriculum to make student understanding (and desired results) more likely" [4, p. 7]. The three-stage process begins with identifying the desired results, determining the acceptable evidence and lastly, planning experience and instruction.

Figure 2 illustrates key aspects of the design phase, grounded in OBE and Backward Design, within the broader context of the ADDIE[1] instructional design framework. While the arrows imply a linear progression, the Blueprinting process is often more iterative. In the Backward Design approach, for example, activities are identified after the assessments have been established.

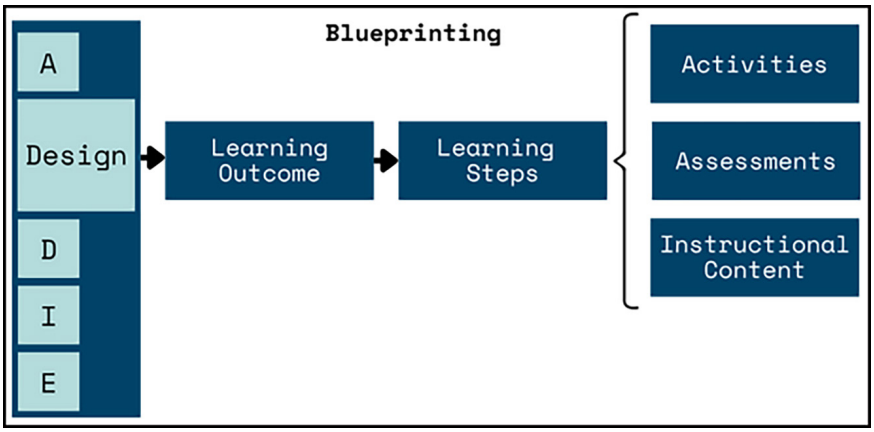


**Fig. 2.** Design process

## 3.2 Criteria for new design process

Given the challenges of blueprinting discussed above, I identified three criteria to guide my search for an alternative design process intended to increase both the efficiency and effectiveness of the design phase in the context of workplace learning:

1. **Ease of Learning:** The design process needed to be intuitive, especially for SMEs unfamiliar with the language, concepts, and general process of course design. I evaluated this by how quickly both the SME and I could grasp and apply the method.
2. **Ease of Use and Recall:** Given the intermittent nature of our meetings and our reliance on Zoom and Teams for communication, the process had to be easy to resume after breaks. I assessed this by how smoothly we resumed design work after breaks of up to two weeks.

[1] ADDIE stands for analysis, design, development, implementation, and evaluation. While ADDIE is often referred to as an instructional design model, it does not prescribe specific methods and so is not a model in the traditional sense. Molenda [11] describes ADDIE as an "umbrella term" used in the field of instructional design.

3. **Performance-Based Focus:** The process needed to prioritize the essential learner tasks or actions to close the performance gap over identifying instructional content. I assessed this criterion by confirming that only the necessary instructional content was developed and by validating with SMEs or expert reviewers that the design would plausibly close the performance gap.

## 3.3 New design approach

My desktop search for a new design model, guided by the above criteria, revealed two models of interest: The Successive Approximation Method (SAM), developed by Michael Allen [12], and the Action Mapping process, developed by Cathy Moore [13]. I provide a brief explanation of each model, followed by my rationale for selecting Action Mapping and how I integrated it into the ADDIE framework.

The second version of SAM [12, 14], referred to as "SAM2," was developed as a rapid alternative to the traditional ADDIE model. It offers a flexible instructional design framework structured around three broad phases: Preparation, Iterative Design, and Iterative Development. The design and development phases involve multiple cycles of prototyping and review, each intended to gather feedback and progressively refine the learning solution toward a final deliverable. SAM is applied across various contexts, including the corporate sector and higher education [12]. SAM1, a derivative of SAM2, is intended for smaller projects.

Action Mapping, by contrast, focuses specifically on the design phase with the goal of improving business performance. According to Cathy Moore, it is a "mashup of performance consulting and backward design" (para. 2). The method consists of four key steps:

1. Identify the performance problem.
2. Establish the essential actions or behaviors learners need to demonstrate.
3. Provide authentic practice opportunities.
4. Provide only the essential information to complete the task or solve the problem.

Two project-related considerations led me to choose Action Mapping (see Table 2). First, the project was already underway when I realized the current design model (blueprinting) would not be suitable. The situation called for a new design approach, not a new development approach or a new instructional design model. Second, the design team consisted of the SME and me, so a complex process for gathering input and feedback was unnecessary.

**Table 2.** SAM vs. Action Mapping

| Considerations | Successive Approximation Method (SAM) | Action Mapping |
|---|---|---|
| ADDIE Integration | Offers an alternative to ADDIE. | Integrates into the design phase of the existing instructional design model. |
| Design and Development Prescriptions | Prescribes three cycles of iterative design and development. | Prescribes four design (not development) steps. |
| Stakeholders | Created to maximize input and feedback from stakeholders and the team involved in design and development. | Suitable for small teams, including two-person teams. |

Figure 3 illustrates the evolution of the design process for this project from Blueprinting to Action Mapping. While Blueprinting is often depicted as a linear process, I have found that once the outcomes are identified, the rest of the process is iterative, with frequent back-and-forth among the elements. In contrast, my experience with Action Mapping in this project generally proceeded in a linear manner.

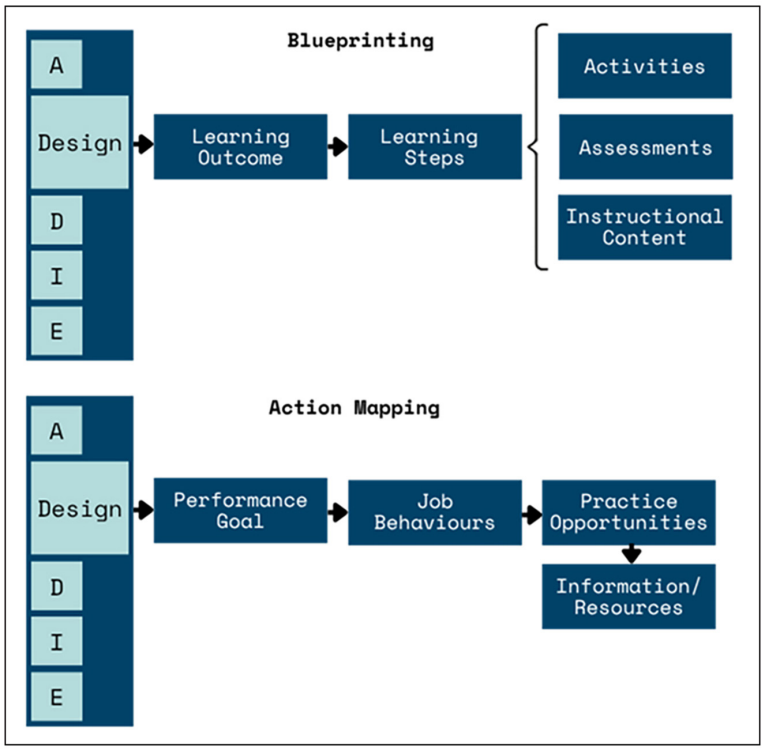


**Fig. 3.** Blueprinting vs. Action Mapping

## 4 ACTION MAPPING

### 4.1 A visual and virtual approach

During the design phase of this project, the subject matter expert and I held weekly or biweekly virtual meetings via Zoom. We created four action maps using Figma; however, while Figma was effective, other free tools, such as Microsoft Whiteboard, which is integrated in Microsoft Teams, could have functioned just as well. Using the Whiteboard app may have even simplified collaboration by streamlining file management and permissions within the Teams environment.

Figure 4 illustrates a comprehensive action map for one microlearning. It consists of one performance goal (green diamond), six job behaviors (green square), eight practice opportunities (light-blue circle), and thirteen information items (dark-orange irregular shape). Twelve "Challenge" items (light-orange irregular shape) were added to elaborate on the practice opportunities; however, the reader should be aware that the language of "Challenges" is not included in the Action Mapping process as developed by Moore.

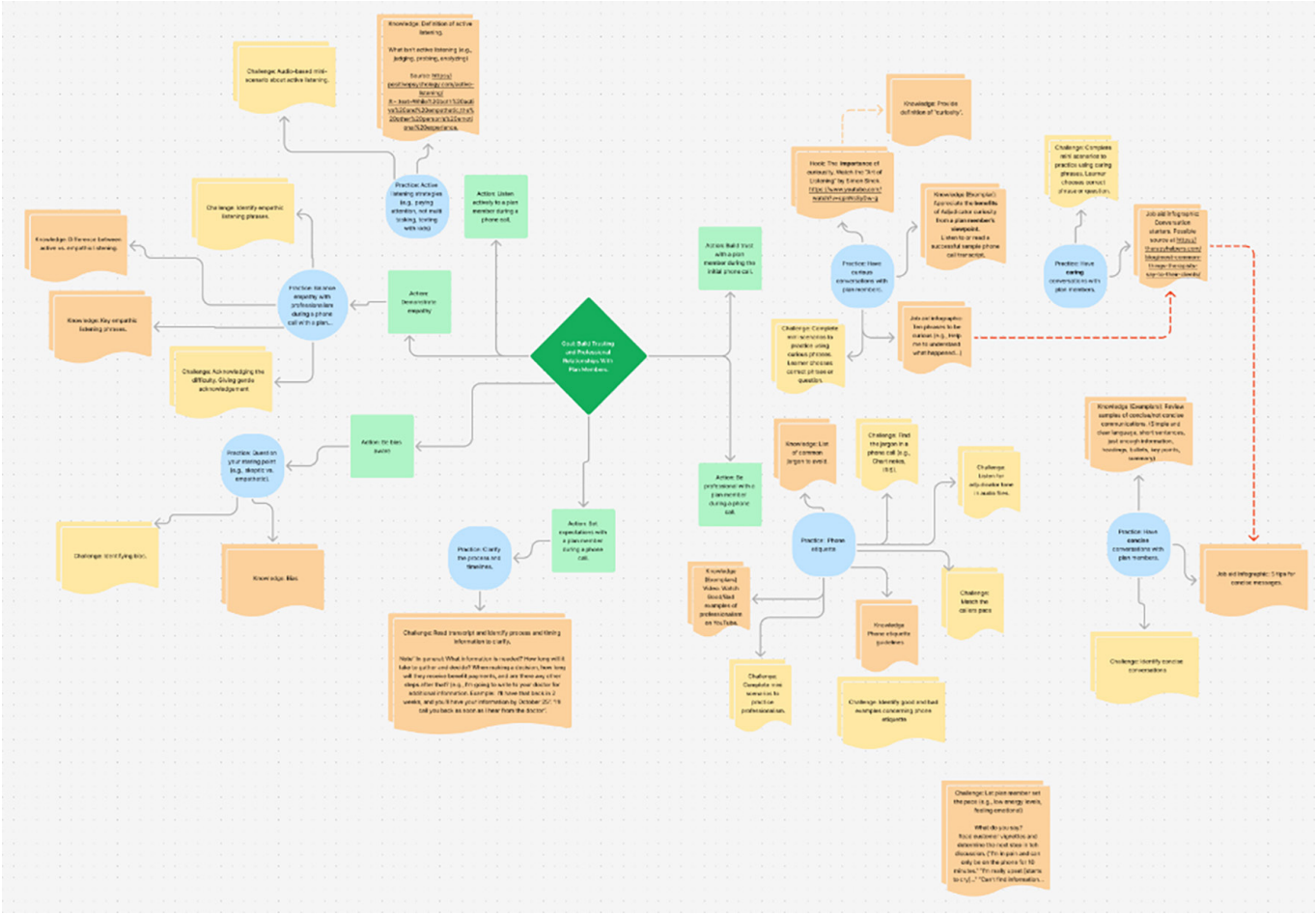

**Fig. 4.** Complete Action Map

Figure 5 provides a close-up view (with annotations in black added for the reader) of one lesson from the comprehensive action learning map shown in Figure 3. It is equivalent to fifteen to twenty minutes of instruction. It features one performance goal, one job behavior, two practice opportunities and three information items.

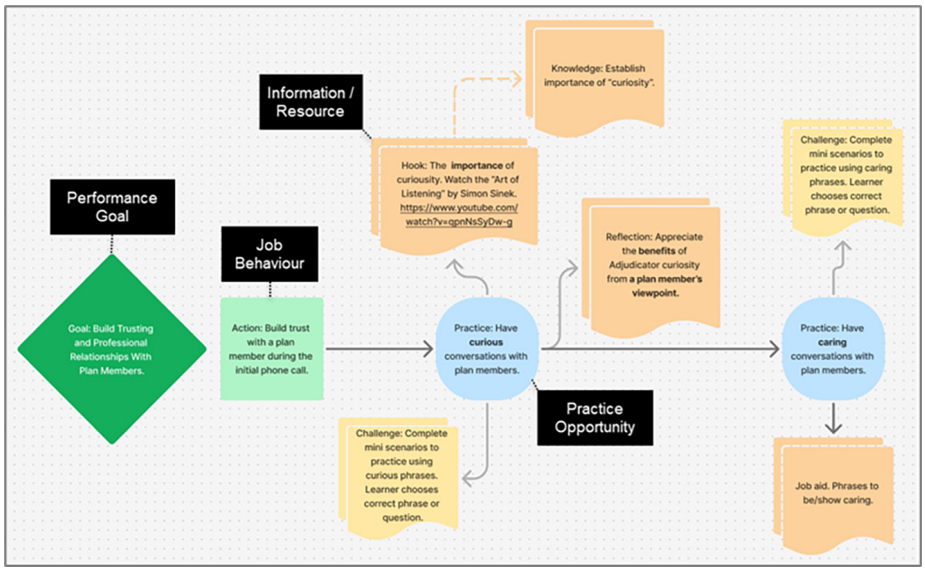


**Fig. 5.** Action Mapping sample for one lesson in a microlearning

## 4.2 Post action mapping

Following the completion of the action map, I followed standard instructional design best practices to identify the instructional prescriptions necessary to support learning about interpersonal skills (as opposed to facts, concepts, rules and procedures), which I had deduced from the performance goal and job behaviors in the completed action map (see Table 3).

**Table 3.** Aligning the performance goal and job behaviors with practice

| Performance Goal (Interpersonal Skill) | Job Behavior | Practice Opportunity |
|---|---|---|
| Build trusting and professional relationships with plan members. | Build trust with a plan member during the initial phone call. | Have curious conversations with plan members. |
| | | Have caring conversations with plan members. |

As explained by Morrison et al. [7], "performance for interpersonal skills is either recall or application, with a primary emphasis on application" (p. 158). It consists of four steps, as illustrated in Table 4, along with my efforts to align and elaborate on one of the practice opportunities identified in Table 3, and a screen capture of the completed development.

**Table 4.** Instruction steps, elaboration and illustrative examples

| Steps | Practice Opportunity: Curious Conversations |
|---|---|
| **1.** Present the model and focus the learner's attention on the desired behaviors. | A text-based scenario is provided to model how an adjudicator brings a curious perspective to a discussion with a plan member (see Figure 6). The learner's attention is directed to key phrases by checking their answers.<br><br>Note: Learners are assumed to have prior knowledge of curious phrases and are asked to identify three phrases used by the adjudicator. |

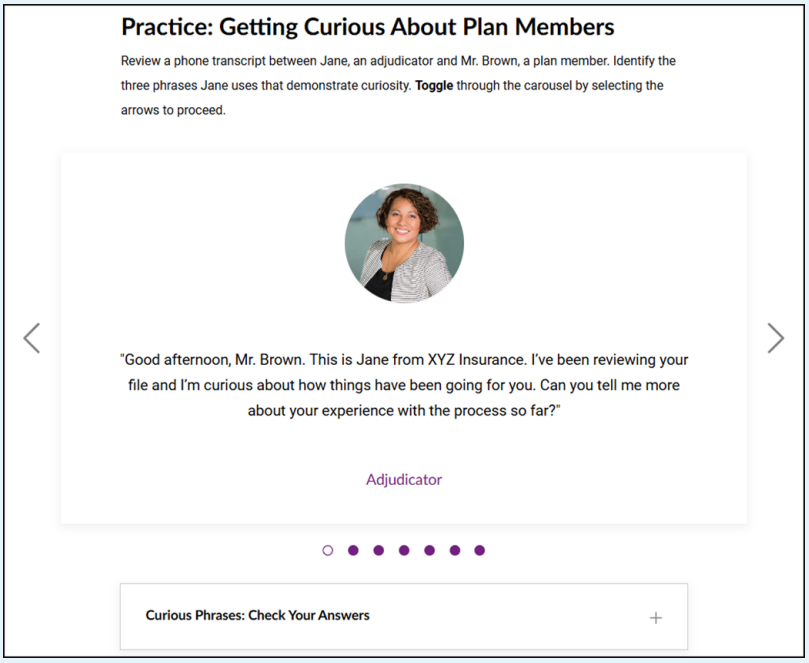


**Fig. 6.** Practice

*(Continued)*

**Table 4.** Instruction steps, elaboration and illustrative examples *(Continued)*

| Steps | Practice Opportunity: Curious Conversations |
|---|---|
| **2.** Develop verbal and imaginal models by asking learners to identify the key behaviors. | Three authentic audio scenarios (with transcripts) are provided. These provide "imaginal" models, enabling the learner to "develop an image of the behavior" [6, p. 159] (see Figure 7). |
| **3.** Encourage mental rehearsal. The learners will identify how they would respond. | Learners are asked to identify the curious phrases used in authentic conversations between adjudicators and plan members. Instructional feedback is provided, elaborating on the correct responses and explaining the reasons for incorrect responses (see Figure 6). Learners have not been taught these phrases. The purpose is to activate prior knowledge within the context of adjudication. |

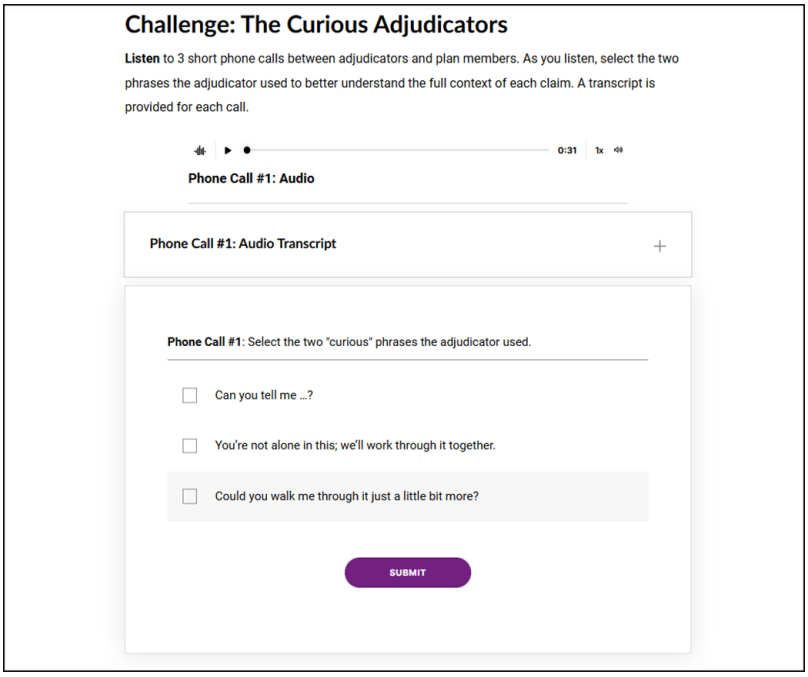


**Fig. 7.** Challenge

| | |
|---|---|
| **4.** Overt practice. | Learners are not provided with an opportunity to practice with one another, nor are they presented with examples and asked to elicit phrases used. It is assumed they will be able to recall the phrases.<br><br>Rather, they are asked an attitudinal question to gauge whether they appreciate the value of bringing a curious perspective to their work as adjudicators: "To what extent do you agree that by showing genuine interest in others' thoughts and experiences, adjudicators can create more engaging and meaningful interactions with plan members?" (see Figure 8). |

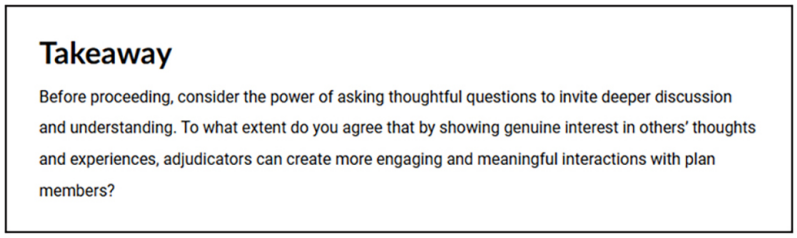


**Fig. 8.** Takeaway

# 5 DISCUSSION

## 5.1 Evidence of design success

Following the completion of the project, I reflected on the extent to which the Action Mapping process met the three design criteria and other valuable insights during the project.

- **Criteria #1-Ease of Learning:** The Action Mapping process met this criterion. Essentially, I introduced Action Mapping through a brief ten-minute training session, presenting it as a four-step process. I showed one example (see Figure 9). Immediately afterwards, the SME and I successfully commenced Action Mapping. My experience confirms anecdotal feedback that Moore [13] has received from other users of the Action Mapping process, who have indicated that the process is "intuitive" (para. 6).

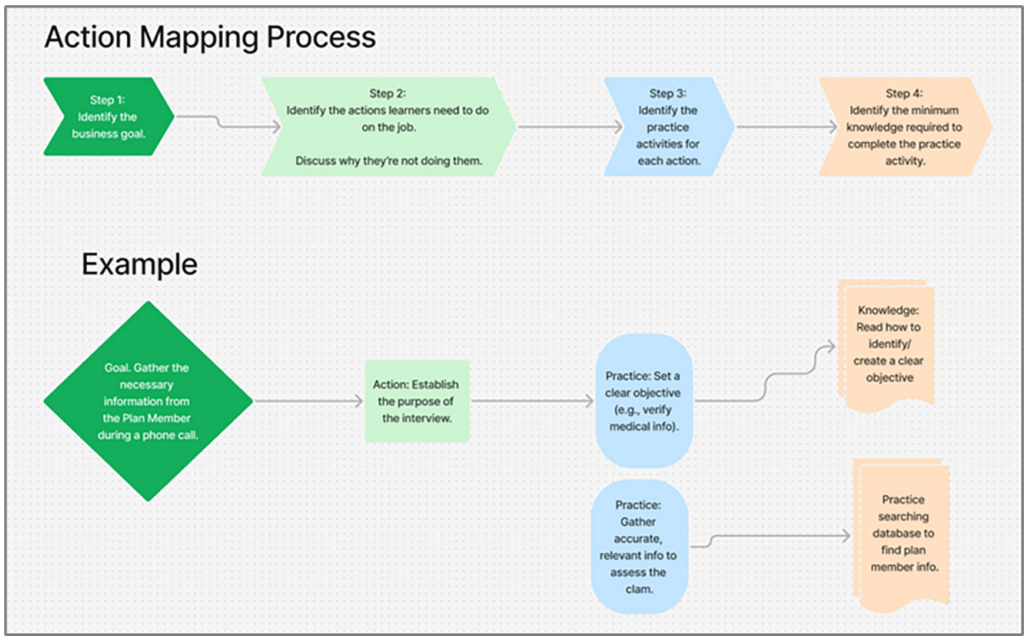


**Fig. 9.** Action Mapping training

- **Criteria #2-Easy to Use and Recall:** The Action Mapping process met this criterion, both for myself and the SME. This was important given the intermittent nature of our collaboration. I considered this criterion successful because no further explanation was needed when developing subsequent Action Maps, even with gaps of up to two weeks between meetings.
- **Criteria #3-Focus on Performance-Based Design:** The Action Mapping process met this criterion. The design prescriptions made it easy to prioritize essential tasks related to the performance goal, while ensuring that only the most applicable information was provided to learners. My experience confirms anecdotal feedback Moore [13] received from other users of the Action Mapping process, who indicated that the process results in less "extraneous information" (para. 6).

### 5.2 Other insights and observations

As a result of this project, I have become more aware of the strengths and limitations of Blueprinting and Action Mapping, as well as how the design process mediates the relationship between the designer/developer and the subject matter expert. Table 5 lists the benefits of each design process within the context of workplace learning.

**Table 5.** Benefits

| Feature | Action Mapping | Blueprinting |
|---|---|---|
| Design Format | Visual, branching diagrams | Tabular, text-centric |
| Ease of Learning | ☑ Intuitive and quick to grasp | ☒ Requires familiarity with instructional design |
| Ease of Use & Recall | ☑ Easy to remember and apply | ☒ Can be complex and rigid |
| Performance-Based Focus | ☑ Prioritizes essential job tasks | ☒ May excessively focus on learning outcomes and alignment with assessments |
| Creativity & Engagement | ☑ Encourages divergent thinking and enthusiasm | ☒ May feel procedural or restrictive |
| Collaboration Suitability | ☑ Ideal for real-time, virtual collaboration | ☑ Good for structured team reviews with multiple stakeholders |

## 6 CONCLUSION

My experience with the project reinforced my initial perception that an alternative to Blueprinting was needed to effectively and efficiently complete the design phase in a micro-credential project, especially given the subject matter expert's industry background for this project. Traditional blueprinting, with its emphasis on outcomes, alignment, and quality assurance, often frames design as a technical exercise. While these elements are important, they can inadvertently dampen creativity and reduce SME engagement. In contrast, the more visual and intuitive nature of Action Mapping, consistent with Moore's approach, led to a more generative and enthusiastic collaboration. While Moore [13] indicates that Action Mapping "isn't intended for use in academia" (para 11), research from Franssen et al. [15] and Politis and Lubb [16] suggests the method is being adopted in higher education contexts.

This case study contributes to the growing adoption of Action Mapping in educational contexts, particularly in Centers for Continuing Education, which frequently operate at the intersection of academic and industry contexts. These Centers may find value in incorporating Action Mapping into their instructional design processes, especially when developing micro-credentials tailored to industry needs. Looking ahead, Action Mapping presents numerous opportunities for designers and programs to innovate how micro-credentials are designed and developed. Future directions might include developing an onboarding toolkit for SMEs to enhance scalability and embedding Action Mapping into existing workflows, such as quality assurance or project management, to foster more agile design practices.

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