Instructional Design Workflow Guide

Detailed Step-by-Step Guide for the Scrappy Designer!
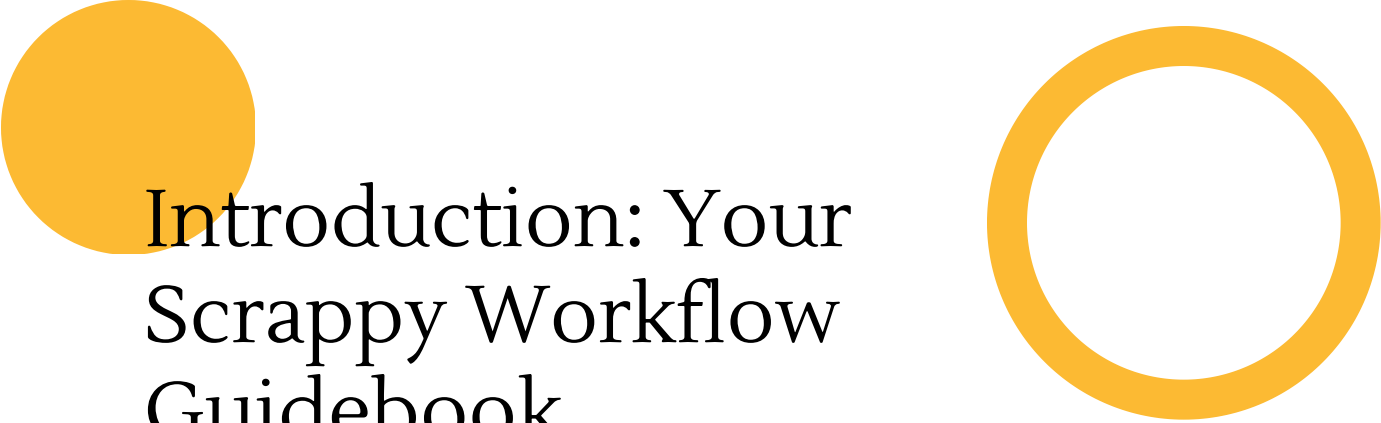
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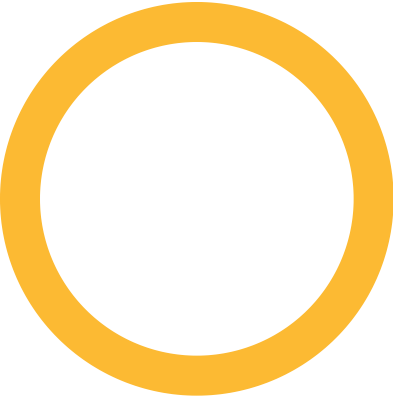**Shannon Tipton**
Learning Rebels

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Introduction: Your Scrappy Workflow Guidebook

Welcome to the reality of L&D work: impossible deadlines, nonexistent budgets, and stakeholders who want everything yesterday. If you're waiting for perfect conditions to create training, you'll be waiting forever. This guidebook is for instructional designers who need to ship training content that actually works—without the fancy tools, unlimited time, or massive budgets that exist only in conference case studies.

What You'll Find Inside

Five detailed workflows that cover the most common scenarios you'll face:

Workflow #1: The 48-Hour Video Workflow - When you need training video content fast and can't overthink it.

Workflow #2: Turn a Document into Something Useful - For when someone hands you a 40-page PDF and expects you to make it engaging.

Workflow #3: Rapid eLearning Workflow - Build courses quickly for processes, compliance, and product knowledge.

Workflow #4: TechSmith Complete Workflow - Create polished professional video content using mobile and desktop tools.

Workflow #5: The Scrappy AI Workflow - Use AI to speed up content creation without losing your humanity (or your job).

How to Use This Guidebook

These aren't rigid rules. They're starting points. Adapt them to your context, your tools, and your learners. Steal what works. Skip what doesn't. Mix and match steps from different workflows.

Each workflow includes:
- Time estimates (so you can plan realistically)
- Step-by-step instructions (because "just figure it out" isn't helpful)
- Tool recommendations (free and budget-friendly options)
- AI Tips (where artificial intelligence actually helps)
- Pro tips (lessons learned the hard way)

Important Caveat: Tools and Processes Evolve

Here's what you need to know: This guidebook is a snapshot in time. The tools mentioned here: the features they offer, their pricing, even their names, will change.
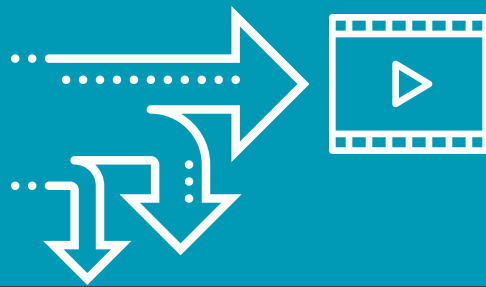
What this means for you:
- Treat specific tool recommendations as examples, not requirements
- Focus on the workflow principles, not the exact tools
- Expect to adapt these processes as technology evolves
- Check current tool features before committing to any platform
- When a tool changes significantly, find an equivalent alternative

What won't change:
- The need to work quickly with limited resources
- The importance of beginning with the end in mind
- The value of testing with real learners before scaling
- The fact that done beats perfect
- Your role as the human who makes content actually work

We'll update this guidebook periodically, but don't wait for updates to start creating. Use what's here as your foundation, adapt to your current reality, and ship training that helps your learners.

Workflow #1: The 48-Hour Video Workflow

Best for:	Quick training videos, software demos, process walkthroughs, just-in-time learning
Time investment:	**4-8 hours total**
Step One:	**Script It Out (30-60 minutes)**

	• Open Google Docs for collaboration
	• Write a conversational script (not a word-for-word teleprompter script)
	• Include:
	    ○ Hook (why this matters)
	    ○ 3-5 key points
	    ○ Specific examples
	    ○ Clear next steps
	• Keep it under 5 minutes of talking time (roughly 625-750 words)
	• Share doc with stakeholders for quick review

AI TIP	Stuck on how to start? Give ChatGPT or Claude your key points and ask it to create a conversational script outline. Example prompt: "You are an expert in [insert topic], create a conversational 3-minute video script outline about [topic] for [audience]. Include a hook, 3 main points with examples, and a clear call to action." Edit the output to match your voice and add specific examples. *Read it out loud. If it sounds stiff, rewrite it.*
Step Two:	**Record Your Video (1-2 hours)**
	Option A: Using Loom • Open Loom desktop app or browser extension • Choose screen + camera, screen only, or camera only • Click record • Deliver your content naturally (don't worry about being perfect) • Click stop when done **Option B: Using Your Phone** • Find good natural lighting (face a window) • Prop phone at eye level • Use earbuds with mic for better audio • Record in landscape mode • Keep it casual and authentic **What to include:** • Brief intro (who you are, what they'll learn) • Main content following your script structure • Clear call to action at the end

Workflow #1: The 48-Hour Video Workflow
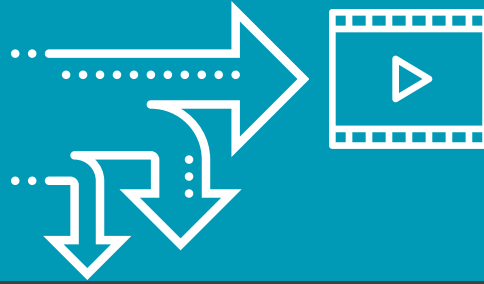
| Step Three:	Add Captions (15-30 minutes)

	• **If using Loom:**
	   ◦ Captions generate automatically
	   ◦ Review and fix any errors in the editor
	   ◦ Download if needed
	
	  If using other tools:
	   ◦ Upload to Descript for AI-powered transcription (highly accurate)
	   ◦ Or use VEED for online caption generation
	   ◦ Rev.com for professional human transcription ($1.50/minute)
	   ◦ Otter.ai for automated transcription
	   ◦ Edit captions for accuracy
	   ◦ Download caption file (SRT or VTT format)
	
	  Or use:
	   ◦ VEED (online editor with auto-captions)

⭐ **AI TIP**	Most auto-captioning tools use AI but still need human review. Common AI caption errors include: technical jargon, acronyms, proper names, and homophones (their/there/they're). Scan for these specifically to save time rather than reading every word.
Step Four:	Edit (Optional, 30-90 minutes)
	Basic editing (good enough for most): • Trim dead space at beginning/end • Cut major mistakes or long pauses • Add simple title slide if needed **Tools for basic editing:** • Loom's built-in editor (trim only) • Descript (edit video by editing text) • Camtasia (more robust, learning curve) **Advanced editing (only if necessary):** • Add graphics or callouts • Include B-roll or screen captures • Add background music • Use DaVinci Resolve (free) or ScreenFlow (Mac) **Important:** Don't over-edit. Authentic beats polished.

Workflow #1: The 48-Hour Video Workflow
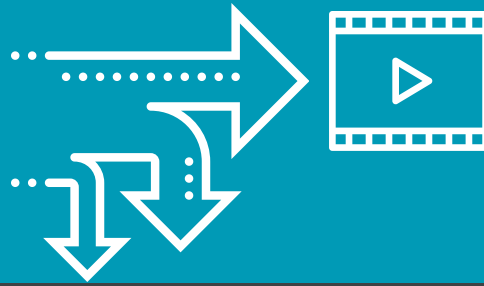
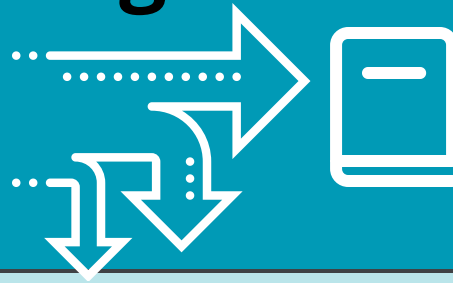| Step Five:	Host and Share (15-30 minutes)
	Hosting options: - Loom: Share link directly, embed in courses - LMS: Upload directly if file size allows - Vimeo: Free tier for basic hosting - YouTube: Unlisted for internal use **Delivery checklist:** - Test on mobile and desktop - Verify captions are working - Check audio levels - Confirm link permissions

Workflow #2: Turn a Document into Something Useful

Best for:	Compliance docs, policy updates, reference materials, standard operating procedures
Time investment:	2-4 hours Total
Step One:	**Audit the Source Document (30 minutes)**
	• Open that PDF or Word doc you've been avoiding • Skim for the actual learning objectives • Ask yourself: "What do people actually need to DO with this information?" • Highlight or note key concepts (aim for 5-8 main points)
⭐ **AI TIP**	**Use AI to help:** • Upload document to ChatGPT or Claude • Prompt: "Extract the 5-7 most important concepts from this document that someone needs to know to [specific task/compliance requirement]" • Review AI output and verify accuracy
Step Two:	**Extract Key Concepts (45 minutes)**

	For each key concept, identify:
	• The core idea (what)
	• Why it matters (so what)
	• What they need to do (now what)
	
	Organize into:
	• Must know (critical for compliance/safety)
	• Should know (important context)
	• Nice to know (reference only)
	
	Create a simple outline:
	1. Key concept
	    1. Why it matters
	    2. What to do
	    3. Additional actions
	    4. Example

Workflow #2: Turn a Document into Something Useful

Step Three:	Create Visual Content (60-90 minutes)
	If using Loom: - Captions generate automatically - Review and fix any errors in the editor - Download if needed **If using other tools:** - Upload to Descript for AI-powered transcription (highly accurate) - Or use VEED for online caption generation - Rev.com for professional human transcription ($1.50/minute) - Otter.ai for automated transcription - Edit captions for accuracy - Download caption file (SRT or VTT format) **Or use:** - VEED (online editor with auto-captions)
Step Four:	Convert to Interactive Format (30 minutes)
	Option A: Create an ebook - Export Canva slides as PDF - Use FlippingBook, SmallPDF, or Venngage to create flipbook - Venngage offers flipbook creation plus infographic and presentation templates - Add clickable table of contents - Include hyperlinks to resources **Option B: Create an interactive presentation** - Upload to Genially - Add hotspots or interactive elements - Create simple navigation - Embed videos if relevant **Option C: Keep it simple** - Just use the PDF with good navigation - Add bookmarks for each section - Include a clickable table of contents

Workflow #2: Turn a Document into Something Useful
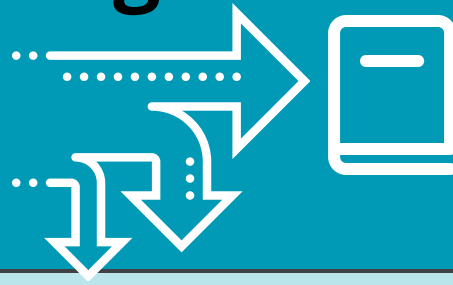
Step Five:	**Package and Deliver (15 minutes)**

	• **Create a simple package:**
	  ○ Visual guide (PDF or interactive)
	  ○ Knowledge check link
	  ○ Quick reference one-pager
	  ○ Optional: Job aid for their desk
	
	  Delivery options:
	  ○ Email with all links
	  ○ LMS upload
	  ○ Shared drive with clear file naming
	  ○ Intranet page

# Workflow #3: Rapid eLearning Workflow

Best for:	Process training, product knowledge, compliance, onboarding, just-in-time learning **NOT for:** Behavior change, soft skills, complex decision-making (these need more time and strategy)
Time investment:	4-8 hours Total
Step One:	**Start with PowerPoint (60-90 minutes)**
	Why PowerPoint: • Your SMEs already know it • Easy to collaborate • Works with most authoring tools • Templates are everywhere **Build your base content:** • One concept per slide • Use notes section for narration script • Keep text minimal on slides • Add placeholders for images **Structure:** • Title slide with clear learning objective • 3-5 main sections • Examples or scenarios • Practice/application • Summary **SME collaboration tip:** • Share PowerPoint first for content approval • Get sign-off before adding interactivity • Use comments for feedback
⭐ **AI TIP**	Speed up slide creation by asking AI to structure your content. Prompt: "Organize this content about [topic] into a 10-slide PowerPoint structure with one concept per slide. Include slide titles and 2-3 bullet points per slide." Copy the structure into PowerPoint and refine. You can also ask AI to write narration scripts for each slide by uploading your slide content and requesting: "Write conversational narration for these slides, 30-45 seconds per slide."

Workflow #3: Rapid eLearning Workflow

Step Two:	Add Visual Interest with Genially (45-60 minutes)
	Import your content: • Export PowerPoint as images or PDF • Upload to Genially (free account) • Choose an interactive template **Add interactivity:** • Hotspots on images (click to learn more) • Reveal buttons (click to show answer) • Tabs for organizing content • Simple animations (but don't overdo it) **Keep it simple:** • Interactive doesn't mean complicated • Every click should have a purpose • Test on mobile devices
Step Three:	**Create Branching Scenarios with Twine (Optional, 60-90 minutes)**

	If your content needs decision-making practice:
	Using Twine (free):
	• Download Twine application
	• Create a simple story structure
	• Present scenario
	• Offer 2-3 choices
	• Show consequences
	• Allow retry or new path
	
	Structure your scenario (Twine):
	  1. START: Present realistic situation
	  2. CHOICE: What do you do?
	     1. → Option A → Consequence → Feedback
	     2. → Option B → Consequence → Feedback
	     3. → Option C → Consequence → Feedback
	DEBRIEF: Why this matters
	
	Export as HTML and embed in your course

⭐ **AI TIP**	Use AI to brainstorm realistic scenarios and consequences. Prompt: "Create 3 realistic workplace scenarios for [topic/role] where someone must make a decision. For each scenario, provide 3 possible choices and the realistic consequence of each choice." Review the scenarios for accuracy and adjust to match your organization's context. AI excels at generating multiple scenario variations quickly.

Workflow #3: Rapid eLearning Workflow
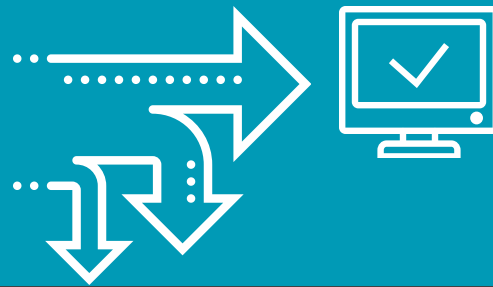
|	
Step Four:	**Add Audio (Optional, 30-60 minutes)**
	Option A: Use Audacity (free) • Download Audacity • Record narration using USB mic or headset • Use noise reduction filter • Export as MP3 • Add to slides **Option B: Use Audiate (TechSmith)** • Record narration • AI automatically removes filler words ("um," "uh") • Edit by editing text transcript • Export clean audio • Sounds professional with minimal effort **Audio tips:** • Record in a quiet room • Use a decent USB mic ($30-50) • Keep narration conversational • Match your slide timing
AI Tip:	If you hate recording Audiate has an AI voice generation tools. Upload your script and generate natural-sounding narration in minutes. Best for: straightforward instructional content. Not recommended for: content requiring emotional nuance or building personal connection. Always listen to the full output to catch any awkward pronunciations of technical terms or acronyms.
Step Five:	**Create Quick Quizzes (30 minutes)**
	Using Kahoot: • Create 5-10 questions • Make it game-like • Free for basic features **Using Google/MS Forms:** • Multiple choice and short answer • Auto-grading • Immediate feedback • Easy to embed

Workflow #3: Rapid eLearning Workflow
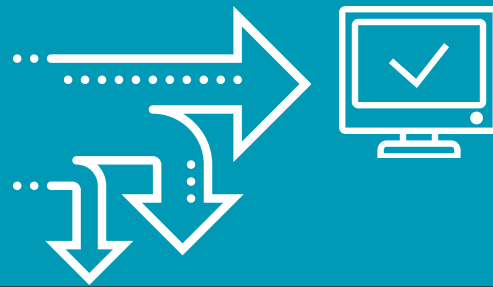
⭐ **AI Tip:**	Generate multiple quiz question variations instantly. Prompt: "Create 10 quiz questions about [topic] at different difficulty levels - 3 easy recall questions, 4 medium application questions, and 3 hard scenario-based questions. Include answer explanations." Pick the best 5-7 questions and customize the scenarios to match your organization's reality.
Step Six:	**Package in Authoring Tool (Optional, 60-90 minutes)**
	If you need SCORM files for your LMS: • Import your content • Add quizzes • Set navigation • Export SCORM package • Upload to LMS • Test • Publish **Don't have an authoring tool?** • Just share the Genially link • Host the quiz separately • Track completion manually if needed
Step Seven:	**Test and Deploy (30 minutes)**
	Testing checklist: • Click every button • Take the quiz yourself • Test on mobile • Verify all links work • Check audio levels • Review with one real learner **Deploy:** • Upload to LMS • Send access link • Set completion criteria • Monitor first few completions **Total time:** 4-8 hours for a basic course

Workflow #4: TechSmith Complete Workflow

Best for:	**Professional mobile video content, software training, product demos, polished learning videos** **Tools: Camtasia Mobile App (free), Camtasia Desktop (paid), Audiate (paid), hosting platform**
Time investment:	3-6 hours
Step One:	**Capture with Camtasia Mobile App (30-60 minutes)**

Setup (5 minutes):
- Download Camtasia Mobile App (iOS or Android)
- Sign in with TechSmith account
- Connect to same WiFi as your computer (for easy transfer)

Recording options:
- **Screen recording:** Capture app demos, mobile processes
- **Camera recording:** Record yourself presenting, unboxing, demonstrations
- **Screen + Camera:** Picture-in-picture style recording

Recording best practices:
- Find good lighting (natural light works best)
- Use external mic, head phones, ear buds for recording
- Hold phone steady (use a small tripod or prop up with books)
- Record in landscape for desktop viewing or vertical for mobile viewing
- Do a 10-second test first

What to capture:
- Software demonstrations on mobile
- Quick tips and tricks
- Process walkthroughs
- On-location "how-to" content
- Authentic, less-polished content

After recording:
- Review footage immediately
- Re-record if needed (while setup is ready)
- Transfer to computer via TechSmith Cloud or AirDrop

Workflow #4: TechSmith Complete Workflow

Best for:	**Professional mobile video content, software training, product demos, polished learning videos** **Tools: Camtasia Mobile App (free), Camtasia Desktop (paid), Audiate (paid), hosting platform**
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Cost Note

While Camtasia and Audiate require investment, TechSmith often has education/ nonprofit discounts and the tools last for years. The time savings and quality improvement typically justify the cost for organizations creating regular video content.

Setup (5 minutes):
- Download Camtasia Mobile App (iOS or Android)
- Sign in with TechSmith account
- Connect to same WiFi as your computer (for easy transfer)

Recording options:
- **Screen recording:** Capture app demos, mobile processes
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- Review footage immediately
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- Transfer to computer via TechSmith Cloud or AirDrop

Workflow #4: TechSmith Complete Workflow

Step Two:	Edit in Camtasia Desktop (90-120 minutes)
	Import your footage: • Open Camtasia on your computer • Import mobile recordings from TechSmith Cloud • Also import any screen recordings done on desktop • Add to timeline
⭐ **AI Tip**	Before you start editing, use AI to create a rough edit plan. Upload your raw footage transcript (or create one using AI transcription) and prompt: "Review this video transcript and suggest: 1) sections to cut for clarity, 2) where to add callouts or annotations, 3) natural chapter breaks for a table of contents." This gives you an editing roadmap instead of randomly trimming footage.
	Editing - continued
	Trim and arrange (20 minutes): • Cut dead space at beginning/end • Remove major mistakes or long pauses • Arrange clips in logical order • Use ripple delete to close gaps **Add annotations (30 minutes):** • Callouts to highlight important areas • Arrows to direct attention • Text overlays for key points • Blur sensitive information • Zoom/pan to focus on details **Enhance visual quality (20 minutes):** • Add intro/outro slides • Include lower thirds with your name/title • Apply transitions (keep them subtle) • Color correction if needed • Cursor effects to highlight clicks

Workflow #4: TechSmith Complete Workflow

Step Two:	Edit in Camtasia Desktop (90-120 minutes)
	Add interactivity (optional, 30 minutes): • Quiz questions at key points • Clickable hotspots • Table of contents markers • Closed captions (auto-generated in Camtasia) **Audio editing basics:** • Adjust audio levels for consistency • Remove background noise with audio effects • Add background music (use TechSmith library) • Tuck music under narration
	Pro tip: Use Camtasia's templates and themes for consistent branding
Step Three	Refine Audio with Audiate (30-60 minutes)
	When to use Audiate: • You have voiceover narration • Audio quality needs improvement • You want to remove filler words • You need to make script changes **Import audio from Camtasia:** • Right-click on audio clip in Camtasia • Select "Edit in Audiate" • Audiate opens with your audio **AI-powered editing:** • Audiate transcribes your audio automatically • Edit video by editing the text • Delete words to remove them from audio • AI detects and highlights filler words ("um," "uh," "like") • Click "Delete All" to remove them instantly **Manual refinements:** • Re-record specific sentences if needed • Adjust pacing by adding pauses • Fix pronunciation or errors • Smooth out transitions

Workflow #4: TechSmith Complete Workflow

Step Three:	**Audiate Continued: Refine Audio with Audiate (30-60 minutes)**
	Audio enhancements: • Apply noise reduction • Normalize volume levels • Add music from Audiate library • Export back to Camtasia **Result:** Professional-sounding narration without the expense of a recording studio
Step Four:	**Final Polish in Camtasia (30 minutes)**
	Quality check: • Watch full video start to finish • Check audio sync with video • Verify all annotations are visible • Test any interactive elements • Preview captions for accuracy **Export settings:** • Choose production format • For LMS: MP4, 1080p • For web: Smart Player (interactive HTML5) • For sharing: YouTube or Vimeo preset • Enable captions in export **Accessibility checklist:** • Captions included • Audio description (if needed) • Alt text for graphics • Keyboard navigation works • Color contrast meets standards
⭐ **AI Tip**	Use AI to enhance your accessibility efforts. Run your caption file through ChatGPT or Claude with this prompt: "Review these video captions for clarity and accessibility. Flag any: 1) technical jargon that needs explanation, 2) missing sound descriptions, 3) unclear speaker transitions." AI can also help you generate audio descriptions for visual elements if needed for full accessibility compliance.

Workflow #4: TechSmith Complete Workflow

Step Five:	Upload and Share (20-30 minutes)
	TechSmith hosting options: **Option A: Screencast.com (included with Camtasia)** • Upload directly from Camtasia • Get shareable link • Track views and engagement • Password protect if needed • Embed in courses or websites **Option B: TechSmith Knowmia (for organizations)** • Upload video • Add to video library • Organize by topic/course • Analytics and reporting • Integration with LMS **Option C: Your LMS** • Export as SCORM package (Camtasia + Rev add-on) • Or upload MP4 directly • Set completion criteria • Enable tracking **Option D: YouTube/Vimeo** • Export with YouTube/Vimeo preset • Upload to channel • Set as unlisted for internal use • Embed where needed **Sharing checklist:** • Test link on different devices • Verify mobile playback • Check captions are working • Confirm access permissions • Send to test group first **Post-production:** • Gather feedback from learners • Check analytics/completion rates • Update content as needed • Save project file for future edits

Workflow #4: TechSmith Complete Workflow

Step Two (con't)	Sample prompt for course outline:
	You are a SME in [Topic]. Help me to create a [length] training course on [topic] for [audience]. The skills or behaviors needed as a result of this training 1. [Item 1] 2. [Item 2] 3. [Objective 3] My learners are: [describe audience, their current knowledge level, their challenges]. The context of the learning is [describe any necessary background information, pain points, training you've developed in the past, potential barriers to success, Create a course outline with: • 4-6 modules - 3-5 lessons per module • Estimated time for each lesson • One practical activity per module • A knowledge check strategy based on application Keep the tone [conversational/professional/technical] and focus on [application/compliance/skill-building].

General Scrappy Tips Across All Workflows

Remember!

Before you start any workflow:
1. Define the learning objective (what will they be able to DO?)
2. Identify your "good enough" criteria
3. Set a time limit for yourself
4. Gather all source materials first

During creation:
1. Focus on content first, polish later
2. Test with one person before scaling
3. Use templates whenever possible
4. Reuse components you've already created

After completion:
1. Ship it (done beats perfect)
2. Gather feedback quickly
3. Iterate based on real user data
4. Save successful elements for next time

Remember: The goal is to help learners, not win design awards. If it works, ship it.

Learn More about Learning Rebels

SCAN ME

These workflows are part of "**The Scrappy Instructional Designer's Workflow Guide**" - find more resources at **learningrebels.com**