

E-D-U-C-A-T-E Your Way to Better Learning Outcomes

Solution Architect Playbook

Introduction

Designing learning is a lot like building a house. Don't think so? Read on.

Learning and development is often viewed as a creative discipline, while construction is seen as an engineering discipline. At first glance, they seem to have little in common. One builds capabilities; the other builds buildings.

Look more closely, however, and the parallels are striking. Both disciplines transform an idea into a finished product through a structured process involving specialists with complementary expertise.

A successful building project begins with an architect. An architect doesn't start by choosing paint colors or selecting furniture. Instead, they work with the client to understand what the building needs to accomplish. How many people will use it? What activities will take place inside? What regulations must be followed? What budget is available? What tradeoffs are acceptable?

From these conversations, the architect develops a blueprint that balances business objectives with practical constraints.

The same responsibility belongs to the Learning Solution Architect. Rather than immediately proposing videos, eLearning modules, workshops, or simulations, the Solution Architect first works to understand the organization's goals.

The Architect Asks...

- How many people will use it?
- What activities will take place inside?
- What regulations must be followed?
- What budget is available?
- What tradeoffs are acceptable?

The Solution Architect Asks...

- What business problem are we solving?
- What capabilities need to improve?
- Who are the learners and why aren't they performing as desired?
- What systems, technologies, and constraints already exist?
- What budget and timeline are available?

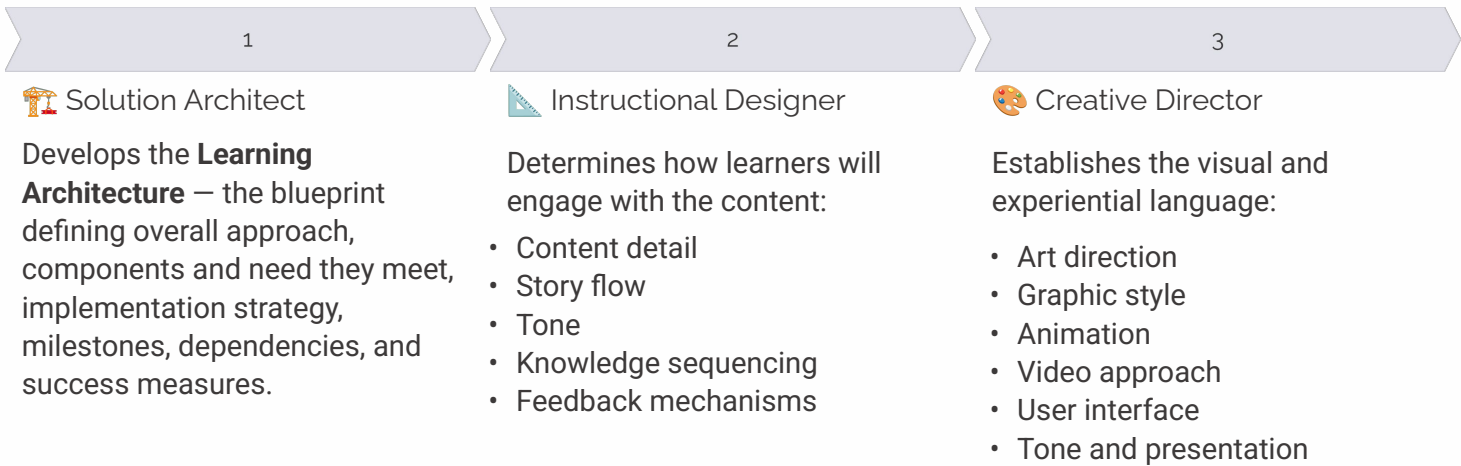
These inputs are used to draft a learning architecture. A **Learning Architecture** is a blueprint that defines the overall approach, major components, implementation strategy, milestones, budget, dependencies, and success measures.

| Like a building blueprint, this design ensures everyone is working toward the same vision before construction begins.



Only after the building's structure has been designed, attention turns to the spaces people will actually experience. This is where the interior designer comes in. An interior designer determines how each room should feel and function. They select finishes, colors, lighting, furnishings, materials, and layouts that make the space both practical and engaging.

In learning projects, this responsibility is shared between the Instructional Designer and the Creative Director.



Together, they transform the Solution Architect's blueprint into a detailed design that learners will eventually experience.

Just as no one remembers the structural beams hidden inside a building, learners rarely think about learning architecture. They remember how the experience felt.

Even the most beautiful architectural plans remain ideas until skilled trades begin construction. The trades bring the plans to life. A Learning Development Team does the same.

 Building Trades

- Electricians install wiring.
 - Plumbers connect infrastructure.
 - Painters finish surfaces.
 - Carpenters assemble structural components.
 - Flooring specialists complete the final details.
- Each trade contributes specialized expertise while coordinating closely with the others.

 Learning Development Team

- Script writers crafting dialogue and scenarios
- Graphic designers producing illustrations and visual assets
- Video producers creating multimedia
- Animators bringing concepts to life
- Developers assembling digital experiences and supporting materials
- AI conversation designers building realistic simulations
- Quality assurance specialists validating functionality and learner experience

Individually, each contributor performs a specialized craft. Collectively, they construct the finished learning experience.

Great buildings don't happen because talented tradespeople simply begin construction. They happen because thoughtful planning, intentional design, and skilled execution are aligned. The same is true for learning.

Solution Architecture

Defines the overall structure — the blueprint that guides everything that follows.

Instructional Design & Creative Direction

Shapes the learner's experience — how it feels, flows, and functions.

Development Specialists

Build every component with care — turning design into a finished, working experience.

Successful learning experiences begin with a Solution Architecture that defines the overall structure, continue with Instructional Designers and Creative Directors who shape the learner's experience, and are ultimately realized by development specialists who build every component with care.



Great learning experiences happen because thoughtful planning, intentional design, and skilled execution are aligned.

The Solution Architect Process: Three Phases

In the previous section, we compared learning design to property development. Just as every successful building begins with an architect who transforms a client's vision into a practical blueprint, every successful learning initiative should begin with a Solution Architect who translates business needs into a solution architecture. This guide focuses on that role and the process for executing it.

A common misconception is that solution architecture begins by selecting learning modalities: Should this be eLearning? Instructor-led training? AI roleplay? Coaching? Video? These questions come far too early.

Just as an architect wouldn't begin by selecting flooring before understanding how the building will be used, a Solution Architect should resist discussing solutions before fully understanding the performance problem.

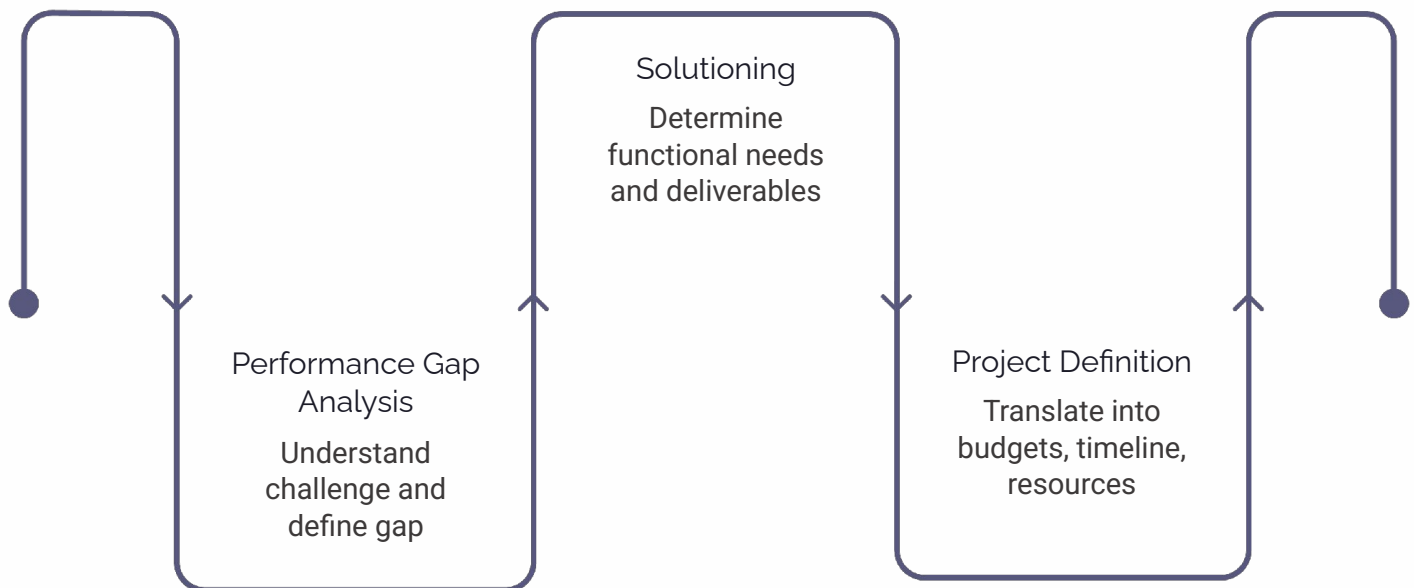
Instead, the role follows three distinct phases:



Common Misconception

A common misconception is that solution architecture begins by selecting learning modalities: Should this be eLearning? Instructor-led training? AI roleplay? Coaching? Video?

In these cases, these questions come far too early.



Together, these phases produce the blueprint that guides instructional designers, creative teams, developers, project managers, and business stakeholders.

Performance Gap Analysis

The purpose of performance Gap analysis is to understand the individual and business challenge before discussing solutions.

Rather than asking, "What training do you want?", the Solution Architect asks, "What performance are you trying to create?"

The North Star Question

If this initiative were successful beyond belief, what would success look like?

Avoid vague answers. Define observable, measurable outcomes that guide every design decision that follows.

Step 1: Define the Desired State

Every engagement begins with this deceptively simple question.

If this initiative were successful beyond belief, what would success look like?

Push past generalities and define outcomes with precision:

- What would employees do differently?
- What business metrics would improve?
- How would managers recognize success?
- What would customers experience differently?
- How would we measure success?

The desired state becomes the north star for every design decision that follows.

Step 2: Create the Desired-State Persona

Develop one or more personas that represent employees performing at the desired level. Give them a name, describe their background and experience, motivations, and anything else that brings them life.

Then describe how they perform as an optimal contributor:

✓ Behaviors & Actions

Their consistent behaviors, daily actions, and the decisions they make under pressure.

🧠 Mindset & Confidence

Their mental approach, confidence level, and how they frame challenges and opportunities.

👤 Interactions & Impact

Their interactions with others and their measurable contribution to business outcomes.

Rather than asking what people should *know*, the focus shifts to what exceptional performers consistently **do**.

Step 3: Define the Present State

Describe current performance with equal precision. Create one or more personas and describe the reality on the ground today:

- What is happening today?
- Where does performance break down?
- What frustrations exist?
- Which business metrics reveal the problem?



At this stage the objective is **observation**—not explanation

Step 4: Create the Current-State Persona

Develop personas that represent today's performers. These personas help the design team build solutions for **real people** rather than hypothetical learners.

☐ Common Behaviors & Misconceptions

What patterns repeat across the workforce? What beliefs are holding performance back?

☐ Motivations & Blockers

What drives today's performer? What hesitations, workarounds, and environmental pressures shape their day?

☐ Decision Patterns

How do they make choices under pressure? What shortcuts or habits define their current approach?

Step 5: Analyze the Performance Gap

EDUCATE is a performance-first methodology for designing learning solutions around the audience's journey from current to desired performance. It helps organizations identify the barriers to change and architect the experiences, capabilities, practice, assessment, and support needed to turn learning into sustained performance.

EDUCATE reframes solution design from "What content does the business need to deliver?" to "What does the audience need to experience to successfully change?" While business outcomes define the destination, the learner's current state, motivations, capabilities, confidence, environment, and barriers determine the journey required to get there. The framework helps solution architects design around that journey—engaging people in the need for change, diagnosing their individual opportunities, building the capabilities they need, giving them opportunities to integrate and practice, assuring competence, supporting application on the job, and adapting as conditions change. Content becomes an enabler of the journey, not the centerpiece of the solution. From the audience's perspective, EDUCATE answers a number of questions:

- **Engage:** *Why should I change?*
- **Diagnose:** *What should I change?*
- **Upskill:** *How do I change?*
- **Consolidate:** *How do I make the new capability stick?*
- **Assess:** *Have I achieved the desired capability?*
- **Transfer:** *How do I sustain and apply the capability on the job?*
- **Evolve:** *How do I adapt as my role and business needs continue to change?*

For the Solution Architect, the EDUCATE framework provides a structured way to identify the needs of the audience that we need to address for the current state employee to transform into the desired state performer.

Engage • Is the target audience's motivation aligned with desired changes and new actions? • If not, what is needed to align motivation with desired changes? • How will we build commitment and communicate why this matters?	Diagnose • Is the audience aware of their need to improve or change? • If not, how will you help them understand their current capability? • How will development be personalized?	Upskill • Skills: What new capabilities or behaviors need to be developed or improved for the audience to perform confidently? • Enabling Knowledge: What concepts, processes, or information does the audience need to know or access to execute capabilities well?	Consolidate What is the need for integrating skills and rehearsing new capabilities for new behaviors to become habits?
Assess Do we need to determine whether employees are ready to perform successfully?	Transfer What support will employees need once they return to work?	Evolve Every significant change—whether in business strategy, workforce capability, technology, regulations, or performance becomes a trigger to restart the Solution Architect process.	

The Solution Architect now considers the realities of the project.

Typical constraints include:

- Budget
- Timeline
- Geography
- Technology
- Travel limitations
- Available subject matter experts
- Existing systems
- Regulatory requirements
- Organizational culture

Learner & stakeholder preferences:

- How do employees prefer to learn?
- What technologies are already familiar?
- What expectations do stakeholders have?
- What operational realities affect participation?

Understanding constraints is a critical input to balancing tradeoffs like upfront investment, development time, and cost to deliver that are important inputs in deciding between delivery methods in the proposed solution. Equally important are learner and stakeholder preferences. These factors influence which solutions are practical and sustainable.

Solutioning

Only after functional needs and constraints are understood does the Solution Architect begin selecting deliverables. Each EDUCATE requirement can be satisfied in many different ways.

A knowledge requirement might be addressed through:

- A document
- A webinar
- A live workshop
- A self-paced module
- A podcast
- A short video
- An AI coach
- A searchable knowledge base
- Embedded workflow guidance

A skills requirement might be addressed through:

- Instructor-led practice
- Peer coaching
- AI roleplays
- Simulations
- Manager coaching

The Solution Architect evaluates each option based on the trade-offs it presents.

Typical considerations include:

Scalability	Upfront development cost	Delivery cost	Speed to market	Ease of maintenance
Ability to update content	Learner accessibility	Opportunities for practice	Measurement capability	Expected business impact

Every medium has strengths and weaknesses.

Live Workshop May produce rich interaction but be difficult to scale globally.	eLearning Module Scales well but offers limited social connection and discussion.	AI Roleplay Provides individualized practice but have high cost to deliver.
--	---	---

Here's an extensive but not inclusive list of potential interventions along with a categorization of each's characteristics.

The Solution Architect's responsibility is not to choose the newest or most engaging technology. It is to recommend the combination of deliverables that provides the greatest business value while respecting organizational constraints.

The result is rarely a single course. Instead, it is an integrated ecosystem of complementary interventions, each serving a distinct purpose within the overall solution.

Phase 3: Project Definition

Converting Blueprint to Executable Project

With the solution architecture complete, the final phase is converting the blueprint into an executable project. Just as an architect produces construction documents before a building can be built, the Solution Architect prepares the information required for instructional designers, creative teams, developers, and project managers to begin their work.

This includes defining:

Final Deliverables The conclusive list of all learning components and assets to be produced.	Development Budgets Detailed financial allocations for the creation and production of each deliverable.	Delivery Costs Expenses associated with the deployment and distribution of the learning solution.	Resource Requirements The necessary personnel, tools, and materials for project execution.
Dependencies Interconnections between tasks and resources that impact project flow.	Milestones Key checkpoints and achievements throughout the project lifecycle.	Project Phases The distinct stages of work from initiation to completion.	Timelines Detailed schedules and deadlines for all project activities.
Risks and Assumptions Potential obstacles and underlying presumptions that could affect project success.			

At this point, the Solution Architect's work is complete. The blueprint has been established. Instructional Designers and Creative Directors can now determine how each deliverable should be experienced by learners, while developers begin constructing the individual assets. Because the architecture was grounded in business outcomes rather than learning modalities, every deliverable exists for a clear purpose, every investment reflects an intentional trade-off, and every member of the project team is aligned around a common vision.

Like a well-designed building, the finished learning solution is successful not because of any single component, but because every element works together to achieve the desired outcome.

Key Takeaways



Start with business outcomes, not learning modalities.

Define what success looks like before choosing delivery methods.



Use personas to understand real performers.

Compare current-state and future-state personas to identify the performance gap.



Apply the EDUCATE framework systematically.

Map each functional need to specific deliverables that address that need.



Balance constraints with functional needs.

Every solution reflects intentional tradeoffs between business objectives and practical realities.



Create integrated ecosystems, not single courses.

Combine complementary interventions that work together to drive performance.



Measure observable behaviors, not just knowledge.

Certification and assessment should validate workplace performance, not memorization.

