Creating an Effective eLearning Program

7-Steps Process

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Assessment

Building an effective e-learning program is a seven-step process. The first step is to assess the current learning situation in three parts: content, learners, and systems. Before we discuss these elements, it's a good thing to remember that e-learning in general is different than traditional learning interventions. E-learning is a different concept, with different conventions, rules, and delivery methods. So if you're new to e-learning, wipe your mind clean while we discuss the seven steps of creating an effective e-learning program. Along these lines, assessing e-learning requires a different "eye" than assessing traditional learning. With that in mind, let's discuss assessing the situation before you begin an e-learning program.

The first element of assessing e-learning is to look at content, both existing and future. Before you look at your existing content, decide what is appropriate for e-learning. In many cases, informational course material is the best way to start with an e-learning program. This type of material can be made easily interactive and lends itself to participants who are not in a classroom. Tutorials, pre-work, and some collaborative exercises such as case studies may also be good candidates for transformation to an e-learning platform.

As far as your future content, you've got a blank slate. One way to see what content is being used and in what contexts is to go out to major Learning Management System vendors such as Learn.com or GeoLearning and ask for a free tour. You'll see that e-learning possibilities are very broad and are only limited by your audience and possibly your budget.

Next, you should assess your learners. On the surface, this may seem like an easy task. You know where your learners are located, how many exist, and what jobs they hold. But to successfully implement an e-learning program you must go deeper into the learner's skills and abilities as they relate to technology. In fact, that's the first question. Are your learners "tech-savvy"? Do they have exposure to computers and computer programs every day? Some parts of your organization may have this exposure, while some may not. It all depends on your industry and your specific organization.

Do you think the learners will be able to learn via online programs? This question extends past ability and into environment. For example, skilled workers who are members of a union may have to have special time and permission written into their contracts. With this question comes the question of management: will you be able to train the management to give their groups time to complete online learning programs? Are your learners adaptable? Let's face it: some groups are not necessarily the most ready to accept change. But then again, if the organization is ready to modernize then it may be time to separate the change champions from the status quo.

Once you've assessed your learners, you must assess your organization's requirements. The first requirement is simply a question of budget. How much money will you have to spend on e-learning development and delivery? Once you have an idea, take a look at the vendors again to see what they have to offer - and at what cost. But before you ask for a demo, decide what "bells and whistles" your system will have. Do you want or need to use streaming video or will a simple platform with basic graphics suffice? Do you have a large number of learners, let's say, over 1000? Finally, determine what technology is already out there - and decide if these computers and equipment stand up to the test of modern e-learning software and applications. We will discuss systems in more detail in the third step of our seven step series on the successful implementation of e-learning programs.

This three-step assessment is probably only the beginning, but you will answer some of the basic questions that can point you toward the right staff, systems, and e-learning content. You'll also have a good idea of what requirements to hand over to your vendors or your IT department, depending on who will help you roll out the new e-learning program.

Once you've taken the time to assess, you're ready to move to step two, converting and creating content.

Convert and Create Content

You've taken the time to assess your content, learners, and overall system requirements. The next step is to understand how to build and deliver e-learning content. In regard to converting existing content, the task is not as simple as dumping pages into an online learning management system or content builder application. The conversion takes careful planning and adherence to some general standards on content. The creation of new content is somewhat easier - as long as you know the standards. Let's discuss content and delivery.

E-learning content, as we've seen previously, is a completely different concept than traditional learning material. First, online content should be brief and must not wander. "Wandering" content is somewhat more acceptable in traditional learning materials, because typically participants take the written materials with them as references. In online learning, the participant is going to learn what content is directed their way and they are probably not going to take anything with them. You can develop content in a brief format by trying to keep each frame to 70 words or less. With this guide, you can also be sure that your content is to the point, that is, in the realm of "need to know" versus "nice to know". Training managers and instructional designers must exercise quite a bit of editorial license to prepare traditional materials for transfer to e-learning platforms.

The content must be learner-directed, as well. Think about a traditional textbook, with "pop outs", tables, exhibits, and references. In e-learning, you can turn appropriate "extras" into a bit of an adventure for the participants. For example, your content can say, "for more information about X, click here". When the participant clicks, you can show a "pop up" or callout with more information. That information will make a special impact in the learner's mind, so use this type of learner-directed concept wisely.

Along the lines of learner-direction, e-learning content should be interactive. Have you ever seen an online course that was simply like turning the pages of a virtual book? Learners can read handouts that are emailed just as easily as logging into your learning management system, so create a way for the learner to interact every few frames. This interaction may be as simple as a review question, a callout, or a quick interactive exercise. In more sophisticated delivery systems, the interaction could be a collaboration with other learners, a video, or even a tutorial or simulation. The idea is to keep your learner's interest by asking them to interact every few minutes.

One of the final things to keep in mind on e-learning content is that modules should ideally be thirty minutes or less. You already know how hard it is to keep an adult learner's attention in the classroom for more than an hour at a time, especially when those learners have jobs, e-mails to answer, and goals to satisfy. Don't make the assumption that an e-learning audience is captive. Keep content brief, learner directed, and interactive.

What special guidelines apply to e-learning delivery? In addition to the usual adult learning principles, such as applicability and timeliness, e-learning content should be the "need to know" content. A fun course is great as long as the content serves a purpose. The quickest way to fail your e-learning program is to use it as a catch-all. Learners will begin to question why they are taking their valuable time to complete courses that make no difference in their jobs.

In addition, e-learning content delivery should be accessible. Don't make it too hard for learners to sign in, take a course, and have a grade recorded. Along those lines, the accessibility of programs is a great place to begin questioning a possible vendor. The content should be "book-markable", that is, the learner should be able to exit the course and go right back to where they left off. Your courses should always begin with a set of instructions on how to use the course, how to advance, how to go back, and how to bookmark. Make this section something that the learner can opt-out of, but have it available anyway.

When you start creating and transferring content for your e-learning programs, keep these guidelines in mind in order to make the experience a good one for all of your learners.

Online Learning Systems

Your existing content has been converted and your new content is ready to be delivered. Now what? Your organization must have some type of delivery system for the online learning program, commonly referred to as a Learning Management System, or LMS. There are numerous questions to analyze and topics to consider before you choose a system. Let's take a look at those topics so that you and your organization can begin asking the right questions in order to implement the right delivery system.

First, you must consider the origin of the delivery system. Will the organization choose a vendor to assist or will it go with internal expertise, namely the IT department? When considering this important decision, remember that there are benefits and drawbacks for both. A vendor-purchased system is typically made-to-order by a group that specializes in just that. You can give the vendor your organization's specifications and they can come back with a system design and price. On the drawback side, the specifications can sometimes be costly - and changes can be slow and costly, as well. A homegrown LMS is fantastic if you have the expertise and resources in-house to build it. An in-house development team knows the organization, its growth, and its audience. Plus, a homegrown system may cost less in the long run. The potential roadblocks to this path are that the expertise must be present in-house - and they must be able to devote themselves pretty much full time to the project. If the department's knowledge of LMS architecture is marginal, you may find more problems than you bargained for.

Once you've made the decision to go internal or external for the build-out of the delivery system, you can begin thinking about the features you'd like to see. Do you want the system to track completion and record grades? Do you want to use those features to register and track your traditional learning programs, as well? Should learners be able to print a certificate of completion for their online courses, no matter where they are located?

On the technical side, does the LMS need to have the capability of creating complex video streaming, interactive modules, and collaboration? If so, how is the existing technology able to accommodate the LMS? On the design side, would you like to see a built-in content development engine, where content developers can essentially "dump" information into the LMS and create effective courses? Or are you going to have a team of technology designers who can take the content, develop it in Flash or HTML, and upload it to the LMS? We'll discuss staffing in a moment, but these technological specifications should be part of your systems discussion from the beginning.

There are some other considerations, as well. What population is going to be accessing the delivery system? Can the organization's infrastructure and bandwidth handle the influx of users? What about access? Do you want users to be able to access the system from the Internet, that is, from anywhere, or just within the confines of the organization's firewall? When thinking through these considerations, be certain that a vendor can offer you all of these options. Add-ons, as we have discussed, can be very expensive. If you're going with an in-house construction, consider pulling an IT person to become the administrator of the online delivery system. Someone will need to make changes as the e-learning program and the organization continue to grow.

Along those lines, what are your staffing needs for the system itself? Typically a person (or more than one person) is needed to administer the system, even if it is purchased from a vendor. Your decisions about the structure of the technology may also affect your staffing. If you are going to design courses outside of the LMS, you'll probably need content designers, who write the material, and graphic designers who can create the course framework, the interactivity, and the testing pieces. And keep in mind that setting up course roadmaps, course schedules, and maintaining the recording end of the LMS may take an administrator, as well.

Now that you have quite a bit to think about when implementing an e-learning system, take the time to answer your questions thoroughly. You'll be glad you did.

Implementation

Your content is ready to go. Your LMS is in place and ready to deliver quality online courses to your entire organization. Is the implementation simply a matter of flipping the switch? It can be, but that is not an effective way to change the organization's mindset when it comes to online training. And a new e-learning program is certainly going to require a new mindset. When you're ready to implement, you must market with a message - and look at changing how the organization thinks about training.

First, marketing is not reserved for the organization's products. Marketing must occur with an e-learning implementation. You should determine how you want to "brand" your online learning. Do you want to use the organization's brand and continue it into the program? Or do you want to create a secondary brand that's used in-house? Either way, you may need to engage your in-house marketing department or an outside consultant to help you design the look and feel of the courses and their rollout. But overall, think about how e-learning is going to change the organization's "life": it's learning that's easy, effective, and a new and exciting way to meet learning requirements! Consider these aspects as you plan your marketing.

The presentation of the message and marketing is equally important. Consider creating informational emails or memos that market the learning program and encourage learners to check out the new system. Along those lines, consider going on "road trips" to various groups in order to plug the new and improved learning. If your organization is already technologically advanced, put your marketing into every virtual location, such as blogs, online collaboration, e-newsletters, and Intranet articles.

In addition to marketing, it is a necessity to obtain buy-in from the executive level in the organization. This group must be ready to get behind the online learning program and sing its praises at every opportunity. In more advanced organizations, the executives even go out on the road trips to talk to the populations. In these organizations, training personnel sometimes test the LMS and new courses on executives. A high-level testimonial from someone's favorite CFO is a great marketing tool and should be used to every advantage. When it comes to marketing the e-learning program, remember that you are pushing a new product - and you need "buyers" for it.

From the operational standpoint, first consider if the rollout of e-learning will be one large act or a phased-in approach. Do you want to hit the entire organization with a few excellent courses, or do you want to roll to a smaller group to get them up and running first? There is really no wrong answer here. It all depends on your organization. Along with this, be sure that you know what the initial headcount could be. You don't want your delivery system to crash because you underestimated the number of users who will be acessing it in the first day, week, or month. A final word on operations: test the system before you roll it out. You can begin testing within the training organization and then expand. Have everyday users go to the courses and evaluate content, ease of access, wait times, and recording. If the test on a small scale goes well, you know you can expand and roll out to a larger number of users.

Finally, remember that implementing e-learning is a change in the mindset of many organizations. It's not just a new system and a new way to take classes - it's a new way of life, one that will make things easier for all involved. But with this new way of life comes new opportunities. For example, managers must learn to schedule employees for training, even if that employee is sitting at his or her desk. The temptation is to call them back into action before they are finished, simply because they are present in the workplace. Plus, someone has to be held accountable for getting learners on the system and allowing them to complete their courses. Typically that accountability also goes to organizational managers. Along with these considerations, remember that if employees are able to access training at home, there may be issues with pay, unions, and maximum work time requirements. The best thing to do with "mindset" is to make a list of all of the considerations, from buy-in to accountability to hourly pay - and decide how the organization will work with each. This way, no question will go unanswered during the implementation phase.

Evaluation

Evaluation of your training programs should be occurring at all times. But keep in mind that e-learning evaluation is different; the goal may be the same but your methods will change slightly. When you evaluate your e-learning program, there are two areas to focus on: learner and content. Let's look at ways to evaluate these areas effectively using your program itself and your delivery system.

The initial evaluation of your e-learning program can take place both at the beginning of the program and throughout its lifetime. In the area of content, the first thing you'll need to do is evaluate the course content. Remember that e-learning is new to your learners and may even be new to the training staff, so discovering how the content is being viewed is critical. You probably conduct "level one" evaluations in your traditional programs, sometimes referred to as "smile sheets" Although this evaluation has a light name, the act should not be taken lightly. The first evaluation is sometimes very valuable. So how do you carry out this task in an e-learning environment? Your LMS may give you the option of putting participants into an evaluation before they get to a test on the material - or immediately after. The best option is to get the evaluation while the audience is "captive". Otherwise, you may not get the evaluation at all.

The content of your evaluation can cover traditional bases, that is, did the learner find the content useful and engaging. But instead of talking about an instructor, substitute the system itself. What was the learner's immediate reaction to the accessibility of the system? Did he or she encounter problems with the navigation or have trouble understanding the instructions? Did the learner encounter long delays while waiting for a video or an activity? If you think about what the learner is seeing and doing at the time he or she is in the course, you'll be able to come up with an effective evaluation.

The learner data, aside from what you can deduce from evaluations, can also be obtained from the system itself. Look at the number of participants you were expecting, or the number of participants who are required to go to certain courses. How many of them accessed the system and the courses? How many of those actually finished the course, took an evaluation, and received a grade? You can also look at initial learner reaction outside of traditional means, especially if e-learning is new to the organization. For example, consider sending out emails to a "test group" of learners in order to get their candid and unstructured feedback. As the e-learning program progresses, consider calling users on a random basis or even having local users attend focus groups. Just because the training intervention is online does not mean that you can't evaluate it in person. Be creative and remember that many members of your audience are more than willing to help you out.

Once you're past the initial rollout, remember to continue taking initial reaction evaluations - and to continue looking at the results. But what else can you do to ensure effectiveness of content and system when it comes to e-learning? Consider using online evaluations at 30 or 45 days after the course is completed. This technique often works in traditional training, so why not take a look at it for your e-learning program? You can find out if the learners found the content useful. And you can evaluate their reactions after they've had time to think about it and take other online courses. Some LMS systems may even "tickle" the user based on his or her login, that is, it may remind them that they need to take an evaluation on a course when they sign in to take another one.

As you move forward, continue to look at the user data, as well. Know what your beginning numbers were and compare them to the numbers you're getting on a monthly basis. You may see small fluctuations in the number of users, but the basic trend you're looking for is an increase in users over time. If that increase doesn't occur, dig deeper using more targeted evaluation methods.

The best thing to remember with evaluation is that you should use all of the data you collect in order to modify your program - and make it effective for the organization and its learners.

Modification

Your e-learning program has rolled out and has come under constant evaluation. What are you doing with the evaluation data? If you're filing it away, that's not quite enough. Every piece of data you receive, whether it seems small or not, can help you modify your e-learning program, keep it fresh, and move it into prominence with your organization. When you consider modifying your program, look at three common areas: system, course design and delivery, and marketing.

Remember that during evaluation you are looking at user data, evaluation data, and even survey data. When you look at modifications to your system, think about that data in system terms. Are users reporting problems with accessibility? If so, you may need to look at the number of users, the organization's bandwidth, or its overall technical architecture. Any of these characteristics can show you specific and overall problems with the program. In specific areas, you may find that accessibility problems are caused by a slow running system, malfunctions in video streaming or interactivity, or overall system preparedness. If you determine that there are issues with your system, make a list of the problems. But don't stop there. Make a list of the solution you'd like to see. For example, if the system is functioning slowly, know what the optimum time should be. Once you have a list of requirements and optimum functions, go back to the vendor or in-house IT department and present it.

The next area to look at is course design and delivery. In evaluation, you've looked at the number of users per course, how many of those users finish the course, and how many leave the system without a course completion. If the system is functioning well, then you should consider the possibility that the courses are not presented as well as they could be. Remember our discussion on e-learning guidelines. Are the courses too long? Are individual frames covered with text and little interaction? Is the content appropriate for e-learning deployment? Are certain courses used infrequently? If so, consider taking them offline to create space for more critical courses. A training organization must always have a thick skin, but now is the time for the group to look at its output very critically for the benefit of the learners. The key item to remember about course design and delivery is that changes must be made consistently, especially if courses are required at certain time periods. For example, if the entire organization must go through compliance training each year, consider making changes to the appropriate courses each year. Learners will appreciate the effort and will always be on top of mandated learning.

In the course of modifying your program, don't forget to look at the marketing and message of the program itself. If user numbers are low, think about the message and how it's being broadcast. Send out surveys to see if learners received marketing information - and what they did with that information. Ask them how they reacted to the message that new training methods were available. Along those lines, find out if learners are being given ample time to complete training - or if they are being pulled back to work before they've had time to take courses. The idea here is to also take a critical look at how the program is being marketed - and to be bold in asking for changes to that message.

Modification of the e-learning program should be gradual, however. Some organizations have been known to pull large parts of the program offline in order to modify it. This may not be the best way to take care of changes. Determine which areas need the most attention and work on those first. But avoid taking whole pieces of the program offline at all costs. Modifications should be so gradual that the learner notices the small changes each time he or she logs in to the system. Your modification should be a "no shock" plan.

Remember to use your evaluation data to make constant modifications to your program.

Regular Monitoring

Now that your e-learning program is up and running, you've evaluated it, made changes, and the organization loves it. Can you sit back and relax? Absolutely not. Your e-learning program requires a constant eye on various areas to ensure that nothing goes off track. One tiny flaw can create large problems, and with large problems comes a loss of users. Organizations have made the mistake of letting the e-learning program "ride", only to find that one day no one is using it. Let's discuss how you can monitor your program at all times.

First, continue to monitor user data. This data includes the evaluations that you've taken the time to create and integrate. But remember to monitor at a deeper level than the evaluations. Are your user numbers up or down? Are the evaluations themselves changing in trend or tone? For example, a course evaluation that was consistently a 5 on a 5-point scale that moves to a consistent 4 is not exactly failing - but is it as good as it once was? You can also see from this type of data if your audience is growing and becoming more sophisticated. If so, you should consider going back to the modification stage to grow with the audience. Be sure to look at the tests that accompany your online courses, as well. Are certain items being missed or skipped on a regular basis? Those items can point to a poorly written question or a malfunction in the interactivity of the item.

Next, be sure to look at your system data. One of the often-forgotten pieces of data for LM Systems is, believe it or not, cost. Once the budget is entered, billing for certain things on an LMS becomes automatic. Be sure that someone is looking at cost for upward trends. For example, the number of users may drop to a point where each one costs more. Or, higher bandwidth use may begin costing the organization more in terms of the overall communications cost. Don't let the cost get away from you.

Another way to look at system data is to find out how many technical troubleshooting calls are made. Whether you are taking calls internally or sending them out to the vendor, you should be able to monitor both number and subject. If users begin showing problems with course access, for example, you may need to tweak your instructions. Whatever the issues, your call information should be able to help you categorize and identify potential opportunities. Also, take a look at the transcripts or records that are being kept by the system. Are learners barely scraping by or are they all making high grades? Are learners being added to the system quick enough to get them going while they are still interested? This information can be monitored on a regular basis and can give you a great deal of insight into your e-learning delivery system.

Course data is also an important monitoring point. You can look at evaluations regularly to see if courses are appropriate. But be sure to compare courses to each other. In other words, what common characteristics are shared between the courses that are being used more often? Do you have a high number of users on required courses only, while job or promotion-related courses are being ignored? Remember that a course evaluation is only going to occur when someone takes that course. Use the data that you can mine from your delivery system to make comparisons - and to make changes to course offerings as needed.

Finally, don't forget to monitor the training staff. It's easy to assume that once the program is up and running the staff will have less to do. This is a common misconception with e-learning programs. As much as we would like the program to run itself, it just won't happen. Is the administrator spending too much time on clerical tasks, like creating course "shells" or entering course descriptions? If so, consider bringing in an assistant. Are course content designers consistently making changes and taking those changes to the graphic designers? Or is there time to turn a course content designer into a combined content and graphics person? Can your marketing be taken over by someone who resides within the training organization? All of these questions will help you monitor your staff and make changes in order to keep things efficient.

An effective e-learning program saves money and time and creates an effective platform to educate the workforce. When you follow these seven steps, you'll have a guideline to creating the best e-learning program possible.

Bryant Nielson – Strategic Alliance & Acquisitions Director at Financial Training Solutions a division of CapitalWave Inc – offers 20+ years of training and talent management for executives, business owners, and top performing sales executives in taking the leap from the ordinary to extraordinary. Bryant is a trainer, business & leadership coach, and strategic planner for many sales organizations. Bryant's 27 year business career has been based on his results-oriented style of empowering.

FinancialTrainingSolutions

Financial Training Solutions (FTS), the instructor-led division of CapitalWave Inc, is a firm made of up industry professionals having a reputation for providing first-rate training and consultancy to banks and other financial institutions. FTS offers professionals who have extensive knowledge, experience and expertise in the areas of banking and finance.

Blended learning is the philosophy on which the company was founded. Our training methodology, integrating theory with practice using our own very powerful training tools, creates a uniquely exciting and effective learning environment. The result pays immediate dividends in the retention of newly-learned concepts and their practical application in the financial marketplace.

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