



# 98 TIPS

*for Selecting and Working with*

# E-LEARNING SERVICE PROVIDERS

Contributing Editor, Marcia L. Conner



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## Introduction

Dear Colleagues,

If you lead an education organization you've learned to be resourceful. There is no other way to succeed. Despite analysis showing learning to be one of the few truly competitive weapons organizations can control, education almost always gets the short straw. It is the nature of being viewed as an expense against the bottom line. Thinking broadly, leveraging our resources, and cultivating strong networks make sound business sense.

Fortunately many e-Learning professional services providers have stepped up to become more like trusted business partners than shortsighted vendors of years past. We can talk candidly about budget constraints, expectations, and hidden politics in ways that would have been unheard of a decade ago. The transparency that comes with Web 2.0 has affected our interpersonal exchanges and in-person interactions, too. The hard boundaries of financial rigor, if anything, make conversation easier because ambiguity is gone.

Our job now turns to how we can work best together, identifying what should be done in-house or where outsourcing would be more economical, and how a team approach can align the brainpower of widely diverse groups, often across the miles.

When compiling this list of almost 100 specific tips and techniques for selecting and then working successfully with e-Learning professional services providers these themes surfaced repeatedly. In our peers' words are the deep and wide lessons learned from personal experience and daily triumphs.

Join me in listening to them, learning from them, and becoming even more resourceful because of them.

*All-ways collaborating,*

— Marcia

Marcia L. Conner  
Managing Director, Ageless Learner

*Proof-of-concept is the only way to go. Make sure you have a set of goals, do research online to find a list of products you think might meet those goals, and then have those providers come in to prove themselves to you. Once you decide on a product, you can use the proof of concept for those folks you have to convince to pay for the work (sometimes that is the hardest part). Good luck!*

—MARGARET CHASE,  
TRAINING COORDINATOR,  
LINEDATA SERVICES

## 54 Tips for Selecting e-Learning Service Providers

Know your corporate learning services' goals and objectives. With these goals and objectives in mind, develop a strong list of key questions. Double-check these questions with your colleagues to see if you have covered all of the bases. Prepare questions well in advance of any meeting with an e-Learning vendor (even for those impromptu solicitation calls) so the process is not overwhelming, time consuming, and counterproductive.

During that initial vendor screening over the phone, ask your top three or four questions to scope out whether or not a meeting is worth the time. My standard questions address my learning organization's top three requirements:

1. What kind of a learning curve exists for non-developers using this software?
2. What kind of collaboration tools are built into the software (for remote teams working together on the course)?
3. Will it work with my LMS, and are you willing to prove that it does?
4. What kind of training and support (if any, and hopefully free) does your company provide?

If you are still interested in the tool after that:

- Ask for a trial version of the software for you to use.
- Schedule a demonstration of the tool with the vendor.
- Have the vendor record the demonstration so that you can review the tool with your colleagues and other stakeholders after the meeting. In addition, you can compare and contrast all the tools you are interested in purchasing. You may find you have even more questions after you have reviewed the demonstration a second time.

Be proactive and do the research. Again, go back to your communities of practice and ask other learning professionals what tools they use and why. Often, I will consult with my e-Learning Developer's Group (<http://finance.groups.yahoo.com/group/eLearningDev/>) and ask specifically "What tools do you use to author courseware and why?" This is invaluable information.

—Linda Nelson, *eLearning Instructional Designer, Iron Mountain*

Be very careful how you list your needs. Separate your desires from required features, and be honest about it. When evaluating the providers, fulfill your required needs first, and then see which desirables are available at little or no cost. Desirables often pump up the price on things.

—Sheri Schmeckpeper, *Director of Distance Learning, Central Arizona College*

Make sure they can meet you where your organization is now. The best solution is not the top level-most interactive design, but rather the one that fits your organization's budget, timeframe, and business goals. Also, make sure they keep you apprised of best practices in your competitive set and the marketplace as a whole. Ensure the vendor carefully assesses your learners' readiness, and delivers to that level with a little stretch to enhance the experience.

—Lisa Stortz, *Strategic Relationship Manager, Allen Interactions*

## 54 Tips for Selecting *continued*

Ask hard questions:

- Free pilot?
- Any guarantee for results?
- How flexible are you?
- How do you keep up with learning trends?
- Which conferences have you attended recently?
- Who are your current partners?
- Do you offer any free training (initial or ongoing, number of attendees allowed)?
- Have you worked with similar organizations, industry, size, culture?
- Have you worked within similar technical environment, (e.g. using dummy terminals)?
- Will I have a dedicated project manager?
- May I speak to former customers?
- How do you treat your employees?
- Will you assist me from planning, implementing, and rollout to reporting and assessing ROI?

—Faith Legendre, Sr. Global Consultant,  
Cisco Systems, Inc.

Select vendors who "get it" from a business perspective. If vendors talk more about terminal learning outcomes and test validity than they do about business drivers and organizational success metrics, you may want to pass them over. This is not new. You want business results. Look for a partner that can discern what knowledge and skills will keep your organization afloat during the current recession. Look for a provider with a proven track record of success that can provide mission-critical training at a competitive price.

—Susan McDonald Osborn, Partner, Laurus  
Design, LLC

Ask for a sample or demo of their service. I routinely meet with clients in a virtual world to demo my offerings and even give away some freebies. More than ever, providers are hungry for your business. Ask why their service would be the best for you.

—David Miller, multimedia developer,  
Newmarket International

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## 54 Tips for Selecting *continued*

Proof-of-concept is the only way to go. Make sure you have a set of goals, do research on-line to find a list of products you think might meet those goals, and then have those providers come in to prove themselves to you. Once you decide on a product, you can use the proof of concept for those folks you have to convince to pay for the work (sometimes that is the hardest part). Good luck!

—Margaret Chase, Training Coordinator, Linedata Services

The right e-Learning professional services provider will be a partner invested in your success because your success is their success. Top questions to ask services providers:

1. Why should we choose you?
2. Is there someone dedicated to our account, and what is their role?
3. What are the annual costs? What are the start-up and set-up fees?
4. What are your service level agreements for hardware downtime, software support, and end-user support?
5. Is your support 24/7?
6. How often do you update your software? Is there a fee for upgrades?
7. Is your system SCORM compliant?
8. What does your implementation process look like?

—Coleman Walker, Vice President, Spectrum Pacific Learning Company, LLC

Be honest, lay out all of your ideas and problems, and ask lots of questions; but be prepared to adjust your dreams to reality, budget, and time, to prioritize and deliberate trade-offs, and to stay engaged throughout the project.

Look for open standards, open APIs, clear documentation, interoperability, cross-platform portability, case studies, and examples of happy customers who you can talk to directly.

Do not expect great results from turnkey outsourcing or delegation to a single party. The main value in paying for professional services is to adapt things to your specific needs and conditions. Develop or roll out projects in small, iterative cycles, so you get a chance to collect and act on user feedback or, "where the rubber meets the road" realities before you are done with the project.

—Ms. G, Owner, NoitacudE LLC

The vendor should provide access at no charge, or offer a proof of concept. If you are evaluating content, make sure that it satisfies five key criteria:

1. Quality of the content
2. How, and how often, the content is updated
3. Instructional design components
4. Behavior and performance-based outcomes
5. Reporting

—Kristin Ford, Owner/President, PC Training Source

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*Be very careful how you list your needs. Separate your desires from required features, and be honest about it. When evaluating the providers, fulfill your required needs first, and then see which desirables are available at little or no cost. Desirables often pump up the price on things.*

—SHERI SCHMECKPEPER,  
DIRECTOR OF DISTANCE  
LEARNING, CENTRAL ARIZONA  
COLLEGE

## 54 Tips for Selecting *continued*

1. They are solid ISDs who haven't gotten over ego. If you sense that a provider knows the theory, but can apply it in a common sense fashion, you have something.
2. They have solid technical skills within their talent pool, but are not enamored with shiny, flashy stuff. You need the bells and whistles at times, but not all the time.
3. Ask to see a portfolio.
4. Ask for references.
5. In this economy, be choosy.

—Charles McGinnis, Technology Director, Abundance Software, LLC

Select a provider who has the same core values as your company. This will assist in ensuring a successful partnership with your selected vendor.

Select a provider who has frontline experience resolving daily e-Learning issues in a customer role. Too often, providers have never spent a day as a customer experiencing complicated business-specific challenges. Selecting a provider who has this experience will expedite solving the e-Learning curve, and help to ensure your goals are obtainable.

Select a provider who has experience in all aspects of e-Learning including strategic planning, analysis, deployment, implementation, project management, systems integration (ERPs, multiple LMSs, content management systems), content development and deployment, SCORM, hosting, technical support, and excellent customer services. If you are working with an ASP platform, request the provider's client up-time over the last five years. If it is less than 99%, this provider is not for you.

Customers can have it all in one provider. Ask the provider to supply you with customer referrals and technical documents to support their claims. Insist on as much information as you can obtain.

—Kelly Lake, CEO, WorldLearn

Consider the design capability, the industrial experience, and the domain knowledge.

—Cindy Xiao, Instructional Designer, IBM

Use quantitative metrics like:

1. How many hours has the provider produced in the past?
2. What are the quality standards the provider uses (like the CMMI)?
3. What is the cost per user?

—Dr. Jasir Alherbish, eLearning Consultant

Check the range and depth of products or services offered, rather than go just by their name or resume.

—Seethalakshmi Natarajan, Instructional Designer, Hillcrest Consulting, Inc.

Look for a provider with a broad range of skills in both e-Learning development and e-Learning technologies.

—Stephen Colucci, CEO, Interact Medical

*Look for a provider with a broad range of skills in both e-Learning development and e-Learning technologies.*

—STEPHEN COLUCCI, CEO,  
INTERACT MEDICAL

## 54 Tips for Selecting *continued*

Identify a provider that offers many levels of service. Find a company that can provide both comprehensive turnkey cradle-to-grave e-Learning, or assist with a piece of the development or hosting activity. For example, you may want to let your team capture their knowledge, and then out-source the consolidation, editing, and hosting of that content.

—MJ Moncher, *Application Process Consultant, Siemens PLM Software*

First, look at their track record. Have others used their services and found it beneficial?

Second, look at a sample of their work and see if it matches your learning style. A good e-Learning program should be designed for all learning styles: doing, hearing, reading, and note taking.

And last, find the one that is going to give you the most for your money. If a 20-minute course costs \$500, and an hour course, covering five times as much, costs \$1000; take the hour course.

—Ilo Gassoway, *Subject Matter Expert, Newmarket International*



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## 54 Tips for Selecting *continued*

Find a company that has experience in your industry, especially for content creation, but also for deployment. If that company understands the idiosyncrasies of the educational content end users, including a high-level personality profile, how they structure their day, and tenure in the industry, the value of the product you are being provided increases.

—Jay Krupp, Director, Educational and Custom Services, Newmarket International

Select external partners and service providers willing to assist you with the continued transition of traditional training to multi-purpose blended learning strategies (i.e. virtual classrooms, Webinars, and self-directed e-Learning). A partner willing to work with you to decide on best mediums and deployment methods for this transition can result in more options for your geographically dispersed or global audiences.

—Michael Sunnarborg, Global Consultant, Target

Use those service providers with streamlined production processes. Use those with strong project management. Choose those with small teams, and not a lot of overhead.

—Clark Quinn, Executive Director, Quinnovation

Looking back: if you have existing vendors, it is time to look back to them. They will be in position to understand the current position of your company with reference to changes in global economic conditions, and can support accordingly.

Freelance: if you are looking for a new e-Learning course, then it is time to outsource the project in chunks to a freelancer. Select the best freelancer with a good track record, and then appoint a project manager to handle the freelance projects. Now you are ready to go.

—Madhanaraj Kubenderan, Developer, dsigns

My experience has taught me that how the service provider handles the selection process indicates how they will handle the development process. I schedule meetings, give them questions ahead of time, pay attention to how they prepare, how they listen to me, and how they get back to me on outstanding questions. Do they have the ability to teach me their process? Are they willing to discuss potential problems as well as benefits? The selection process is a mini-project. If I feel that we have worked together successfully during the selection process, we will be successful in the development process.

—Karen Gilley, Instructional Designer, CCIM Institute

Find consulting firms and independent consultants that do not charge an arm and a leg. Many independent contractors have sprung up in this hard economic time; and many are just as capable as the big shops, at half the price. Check their work (ask for portfolio samples or client references), but do not think you have to go with the bigger shops to get high quality learning and development consulting. Remember what Dwight D. Eisenhower once said, "It is not necessarily the size of the dog in the fight, it is the size of the fight in the dog."

—Steven R Yacovelli, Ed.D., Owner & Principal, TopDog Learning Group, LLC

*Have you done a quick online search to learn about the provider's work? Most providers will have reviews somewhere on the Web. See what the community thinks of prospective providers before you buy.*

—DAVID MILLER,  
MULTIMEDIA DEVELOPER,  
NEWMARKET INTERNATIONAL

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*Just because they have a truck, great tools, and a team of dedicated workers, doesn't mean they know how to build a house. I want to see, walk through, climb stairs, open doors, look out windows, and flush the toilet in a house they actually built.*

—KEVIN THORN,  
LMS ADMINISTRATOR,  
ELEARNING DEVELOPMENT,  
AUTOZONE, INC.

## 54 Tips for Selecting *continued*

Research – ask companies with similar scope and size for their experience – use Internet surveys.

—Trish Parker, Sr. Consultant, Hidden

Use LinkedIn, Twitter, and other social networking sites to get feedback from peers on groups they have used.

—Burke Allen, CEO, NovoLogic, Inc.

Do your homework. Find out what they provide, who their clients are, and what you want them to do for you and your company. Ask to speak to their clients. Salespeople are good, but sometimes they promise the world.

—Fredia Fuller Dillard, Instructional Designer/Coordinator,  
The University of Alabama at Birmingham (UAB)

Ask questions. How versatile are they? How technologically advanced are they? How diverse are they? Are they versed in your industry?

—Michele Largman, Sr. Instructional Designer, Maxine Enterprises LLC

Lean on the shoulder of giants. Look at what others are using, or have used, and get the scoop directly from those with firsthand knowledge. While you are at it, be open to sharing your experiences with others as well. Compare experiences, and ask for free demonstrations using realistic situations that push the limits of the provider's services. This often reveals where there might be technical or support issues, and new discoveries of system features that might be used in future situations.

—Marie Ortega de Ortiz, CPM, Ed.D. (a.b.d), Director of Training, Kansas Juvenile Justice Authority

Find out the rating a particular professional service provider was assigned by those who have actually utilized them. Check a provider's Web site for other organizations that use them, and then contact them for their impression of the provider's service.

—Carol Stoil, Learning Development Specialist, Bureau of Engraving & Printing

Explore a provider's background. Do not just take their word for their experience – get references!

—Michael Peake, President, DataBase Solutions

Look for a strong track record and staying power in the industry. Ask for references and check them. Take your time to talk with potential providers and get to know them.

—Kelly Juhasz, President, JUHASZ Development Group

*Explore a provider's background. Do not just take their word for their experience – get references!*

—MICHAEL PEAKE,  
PRESIDENT, DATABASE  
SOLUTIONS

## 54 Tips for Selecting *continued*

Many e-Learning providers know how to create content and know the rules of great visuals. They may not know how to design instruction that makes an impact, though. Ask if the provider uses professional instructional designers, and ask for examples of how those professionals make e-Learning motivating and impactful. Responses from the provider should go beyond the simple provision of engaging visuals. If you know your learners at all, listen to your own instincts:

- Will the proposed design motivate learners to stay seated rather than cheat their way through the program?
- Is the content presented in a way that is relevant to learners, and will make an impact on their job performance?

—*Esther Bergman, Consultant, Benchmark Performance, Inc.*

- Do a reference check on their skills as well as their attitude.
- Find out their domain specialization.
- Ask them what the things are that they do not do.

—*Geeta Bose, CEO, Kern Communications Pvt, Ltd.*

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## 54 Tips for Selecting *continued*

Look at the vitality of the company. Compare full-time employees versus contractors. Do they have enough people to ramp up or down as large projects come up? Will they have enough people to back-fill if there is a problem?

Also check the financial situation of the company. You do not want to be in the middle of a project when the company suddenly shuts down. Even if the company is private, ask them to share their financial data. They will share as much as they can if they are in good standing, or very little if they are not.

While it is easy to rely on a sales representative, ask to speak with an executive to get a feel for how they treat their customers. How involved are they in the business? If they want your business, an executive will be attentive to you. This creates a name and a voice instead of an invoice number on an Excel sheet.

If you have a large project, try to visit the company. How they present themselves, and how they interact with one another, will be very telling, and help you to feel better about working with this vendor.

Ask for the project manager's resume or background. See if they have any certifications. You will want to be sure you are getting actual instructional designers, ones that can help you recognize learning gaps and objectives. Get to know their team so you know that none of your project is being handled offshore, or being handed off to lower paid contractors.

Check for a formalized quality control process that involves more than one person. Good quality control on the vendor side will save you time and money.

—Ron Zamir, CEO, Allen Communication Learning Services

Examples, examples, examples! There is nothing worse than finding out you hired an e-Learning provider onto a project only to learn their skills are lacking, or they are unable to deliver content on your system. A company who will offer everything they've ever done on a Web portfolio for you to review at your leisure makes a great first impression. Look for more than just screenshots and the names of the companies they work with, but actual working e-Learning courses you can access. This will give you a great idea of their use of images, navigation, flow of content, assessment delivery, etc. I think of it as if I were to hire someone to build my house. Just because they have a truck, great tools, and a team of dedicated workers, doesn't mean they know how to build a house. I want to see, walk through, climb stairs, open doors, look out windows, and flush the toilet in a house they actually built.

—Kevin Thorn, LMS Administrator, eLearning Development, AutoZone, Inc.

- Ask for a trial version.
- Ask for a list of clients, and then call the clients.
- See tools in use.
- Negotiate prices.

—Jeff Krebs, Senior Educational Consultant, GE Healthcare



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## 54 Tips for Selecting *continued*

We can use benchmarking to compare services providers to each other and to the best in class. However, the history and track records of the services providers are more important to us. If we have an existing relationship with a provider, we consider how satisfactory that relationship has been. If we have had a long-term relationship, and if they have a good understanding of our needs, then we would give them preference over other candidates. If the project is one with high value (where we are going to be spending a lot on it), we ask for demonstrations, and we interview the candidates or ask them for a briefing about their intended approach. The demonstration and the approach should align with our mission, vision, and expectations.

—Nalin Abeysekera, Lecturer, Open University of Sri Lanka

Get to know the team, not just the sales people. Who owns the company? What is the team you will be actually working with like, and, most importantly, what do they believe works? By doing this you not only identify the players, but who is most likely to offer you what you want and need. You also learn who will give you the value-add of their own experience. We always benefit by bringing into the mix the collected experience of the provider with the experience of the internal team. Also, you get a chance to learn from your gut by seeing if they get you.

—Paul Pinkman, owner, Paul Pinkman Creative Design, LLC.

Think of your budget and the skill set of the professionals. Do you want first level, fairly linear materials? Click to the next slide. Click to the next slide. Do you want second level material that includes interactivity? Simple interactions. Or, do you want third level materials that include branching and complex interactivity?

The first level materials are very easy and fast to develop. Lower cost and faster delivery. The second level materials take some skill in accelerated learning and a little more time to develop. Developing third level material is complex, and involves cognitive thinking skills. If you want to get the material created quickly you want first and second level. Ask your service providers if they price accordingly.

—Deborah Thomas, President, SillyMonkey LLC

Do a thorough job analyzing the gaps for which you want to provide a solution. Include all potential stakeholders, identify all potential requirements, select several vendors to compare (do a cost-benefit analysis for comparison purposes), and get samples of what they can do using your data.

—Laura Darr, Human Performance Technologist, American Express

Be as prepared as possible going into the selection process. Hold a design meeting with the key individuals from your organization (sponsor, SMEs, designers, etc.) and arrive at a game plan before you ask service providers for estimates. Then network! Ask colleagues at other organizations for their experiences working with their e-Learning service providers to get honest feedback about strengths and weaknesses of the vendors.

—Anne Scott, Training Program Developer, Sodexo

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## 54 Tips for Selecting *continued*

Be honest about your budget and your needs when working out an agreement. We're all trying to make our money stretch, and a good provider will negotiate and compromise to make things work for both sides. But be sure to read the fine print, and ask questions when you are in doubt about anything.

—*Sheri Schmeckpeper, Director of Distance Learning, Central Arizona College*

Experience teaches us that hiring the resources and purchasing the equipment to do everything in-house is often time-consuming and cost-prohibitive. Outsource what you can, and free up your staff so they can focus on your core business. Before you approach a vendor, though, have a clearly defined vision of what you want to share, and what you are willing to provide in the way of timing, collective input, oversight, and budget.

—*MJ Moncher, Application Process Consultant, Siemens PLM Software*

Match their skills to your needs; then hire them for a small project to find out if they can do the job, and if you can communicate well with them.

—*Debra Baxter, Writer & Editor, Baxter Writing Services*



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*Match their skills to your needs; then hire them for a small project to find out if they can do the job, and if you can communicate well with them.*

—DEBRA BAXTER,  
WRITER & EDITOR, BAXTER  
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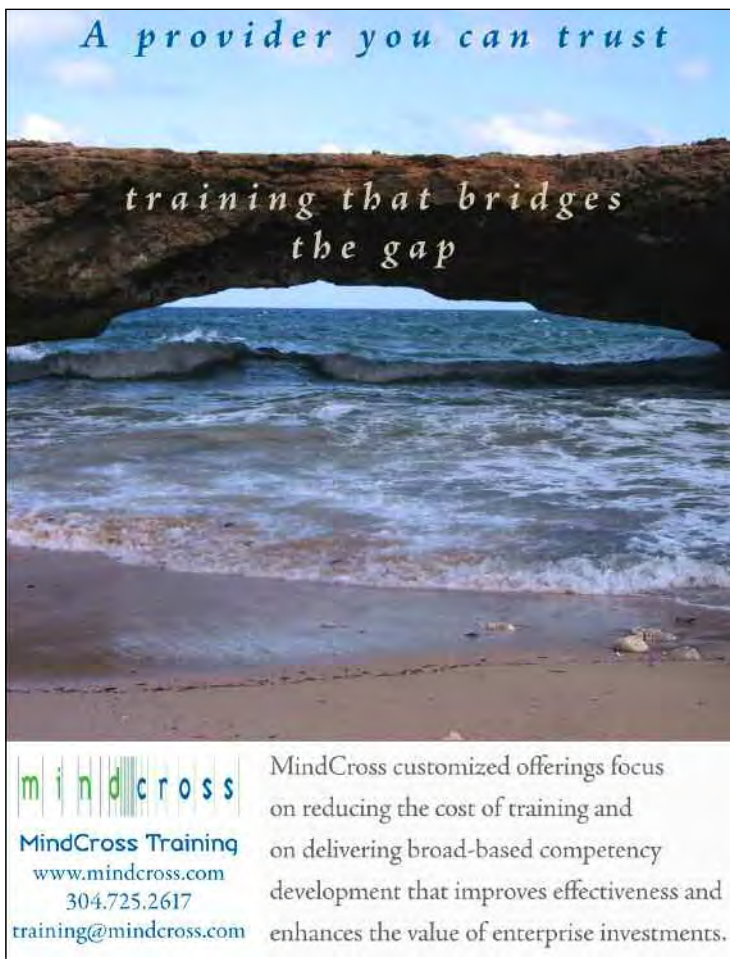
## 54 Tips for Selecting *continued*

Test one or two modules that vendors you'd like to work with have developed in the past. Test the modules in AICC or SCORM within your LMS before you sign the final contract. You do not want to spend several months having a new module developed, and then find out their coding won't track properly in your systems.

—Andy Riley, E-Learning and Technology Mgr., Wachovia / Wells Fargo

To gain a good understanding of the service provider's quality and type of work, view a variety of their work samples. Prior to signing a contract, give the vendor a sample of your content and ask for their ideas for presentation and development to ensure you understand and like their ideas. Also, be sure to have a conversation with the people who will be assigned to your account, and ask about the vendor's course review process. It is less expensive to make changes during various stages of development than to wait until the final review stage.

—Denise Link, Vice President, Phasient Learning Technologies



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## 54 Tips for Selecting *continued*

The opening statement to begin negotiating should be, "We will allow you to put your company's logo on our e-Learning for the privilege of building our e-Learning for free."

—Kevin Thorn, LMS Administrator, eLearning Development, AutoZone, Inc.

Keep your eyes open! When you see something you really like, find out who created it. Check out your resources (like eLearning Guild forums) to ask who did a great job for a project similar to the one you wish to do. Ask if the project came in on time and on budget.

—Jan Watrous-McCabe, Elearning Consultant, Allina Hospitals & Clinics

Be clear. Be concise. All projects should have a clear request. Without one, you may spend several sessions working out the thought process and concept, rather than talking through the project itself. You can always change your mind, but without a clear scope of work, your designers and developers may struggle to meet your needs.

—Michele Largman, Sr. Instructional Designer, Maxine Enterprises LLC

*Do your homework. Find out what they provide, who their clients are, and what you want them to do for you and your company. Ask to speak to their clients. Salespeople are good, but sometimes they promise the world.*

—FREDIA FULLER DILLARD,  
INSTRUCTIONAL  
DESIGNER/COORDINATOR,  
THE UNIVERSITY OF ALABAMA  
AT BIRMINGHAM (UAB)

## 44 Tips for Working Successfully with e-Learning Service Providers

Whenever I have a chance to work with a new colleague for the first time (and my providers are colleagues), I take the time to have a general and casual conversation with her or him. It takes only 20 minutes, but it is a great investment in time. We learn each others communication style, commonalities and differences, strengths and weaknesses. This knowledge, in turn, lets me know how I can better use their talents to help them and my project.

— Karen Gilley, *Instructional Designer, CCIM Institute*

Know their limitations and yours; money, support, learning curve, and so on. Know how much free support they provide, if any. Know where their support staff is located, and if they can really help you or just answer questions they've been taught. If possible, have a contact phone number for each provider, and use their services. And keep the names of tech support people who are good, and do not forget to ask for them directly. Let the company know how much they helped you and how valuable they are.

— Fredia Fuller Dillard, *Instructional Designer/Coordinator, The University of Alabama at Birmingham (UAB)*

The key in any successful relationship is to work in ways that creates commitment on the part of e-Learning professional services providers. There is so much transactional business conducted today that if you make it your goal to develop good working relationships, you will stand out and people will go the extra mile for you. Doing this takes listening, caring, appreciating what they do, and going the extra distance for them.

1. Clarify your expectations so they deliver what you want.
2. Broaden the ways you communicate so at key points it includes calls, not just e-mail.
3. Have clear and measurable goals, outcomes, and milestones.
4. Never lose sight of the quality you want in a rush to meet a deadline.
5. Plan for the unexpected! Have contingencies.

— James DeSena, *Consultant, Speaker, Author — Innovative Sales Solutions, Performance Achievement Systems, Inc.*

Gather all possible materials prior to the initial meeting with the vendor, including previous training materials, marketing tools, images, and other resources. Insist on reviews at every stage of course development, such as script or storyboard, initial development, and final review. If your company requires a legal review, if possible do the legal review in the script and storyboard stage. Be sure to identify one person from your organization who will have the final sign-off for the project. In addition, assign one point of contact to gather and collate the materials and review comments. This person doesn't necessarily need to be a trainer or a subject matter expert. An administrative assistant is often a very good point of contact.

— Denise Link, *Vice President, Phasient Learning Technologies*

## 44 Tips for Working Successfully *continued*

Set the outcome first, and make sure that the criteria are correct. It is too easy to get bogged down with extras each vendor provides. Also, be sure to get the best value for the price paid and do not be afraid to get creative. These are challenging times for vendors. Ask if you can lease the software, or do a multi-year agreement you are held to only if the product performs to certain levels.

—Kristin Ford, Owner/President, PC Training Source

1. Know your budget and stick to it.
2. Create your goals and objectives prior to discussions with any e-Learning professional services provider. Understand your 1-year, 3-year, 5-year, and 10-year goals. Conduct a feasibility study for your organization if you are not sure of your goals.
3. Assess your internal resources, and be realistic about how much you can take on in-house.
4. Choose a point person for your organization who is responsible for the measurement and success of the goals, working with the vendor, and reporting to stakeholders internally.
5. Choose a vendor partner who can articulate and share your vision. You have to enjoy working together, and trust that they will deliver based on your expectations.

— Coleman Walker, Vice President, Spectrum Pacific Learning Company, LLC



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*Do a thorough job analyzing the gaps for which you want to provide a solution. Include all potential stakeholders, identify all potential requirements, select several vendors to compare (do a cost-benefit analysis for comparison purposes), and get samples of what they can do using your data.*

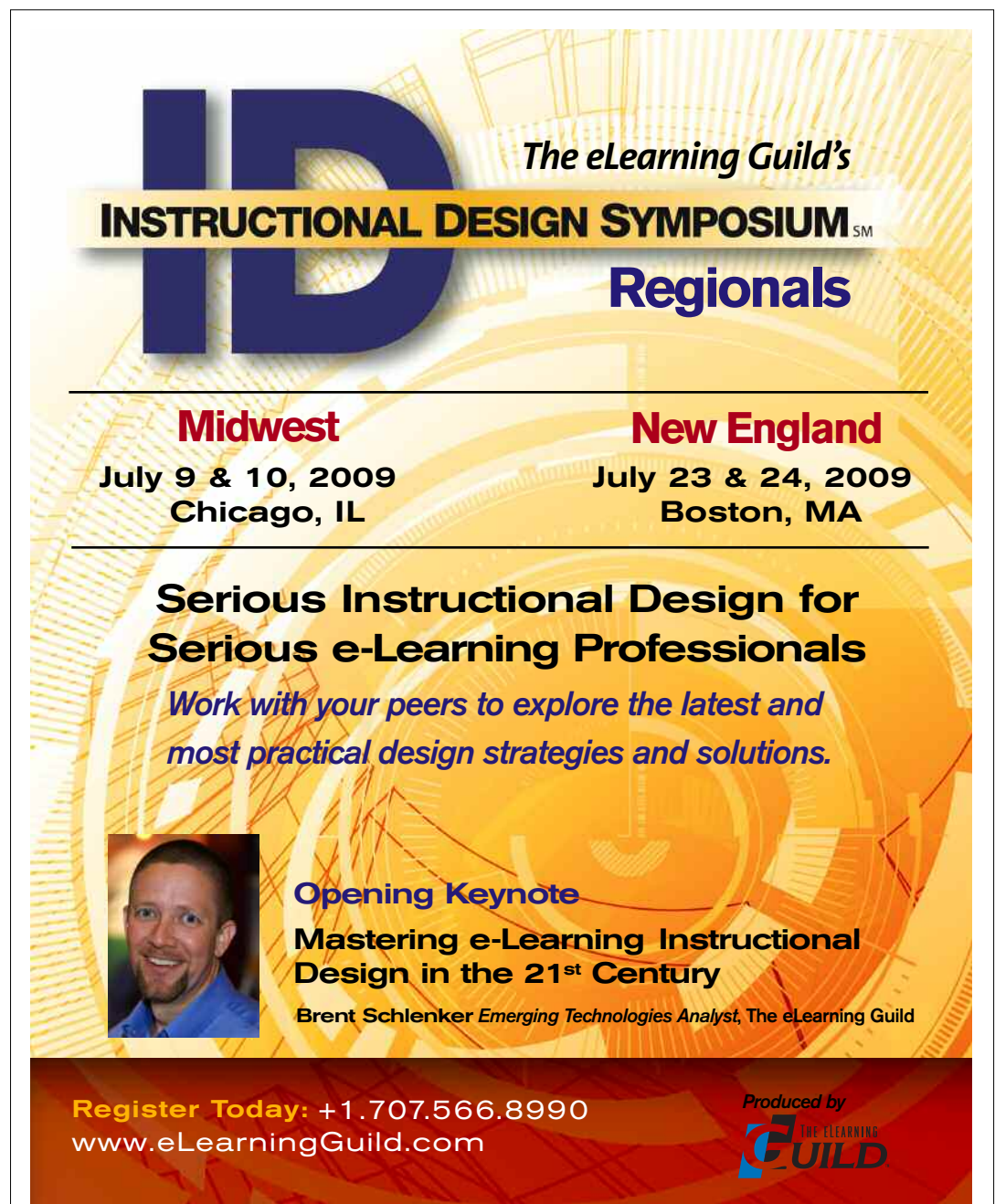
—LAURA DARR, HUMAN PERFORMANCE TECHNOLOGIST, AMERICAN EXPRESS

## 44 Tips for Working Successfully *continued*

Whether you are a department of one or a larger group, make sure to involve IT. You need to understand enough about the technology to do some basic troubleshooting.

Take advantage of "Learn How to Moderate" or "Learn How to Learn" sessions from the vendor. They will give you a fair idea of some tools you have with your new environment.

—Paula Cancro, Faculty, College of Westchester



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## 44 Tips for Working Successfully *continued*

Find a provider with expertise in your market. Define the review team, then provide timely reviews and show them to your boss or VP before the day they're due.

—Stephen Colucci, CEO, Interact Medical

Clearly identify the project scope, and determine ahead of time what is in scope and what is out. Identify both the methods of communication and how you will do business. Ensure you stay on track with deliverables and timelines.

Kelly Juhasz, President, JUHASZ Development Group

- Help them understand the larger context.
- Define success on the engagement.
- Control circulation of information and consolidate feedback.
- Assign a project manager from your side to coordinate with theirs.

—Clark Quinn, Executive Director, Quinnovation

Respect, communication, communication, communication!

—Laura Darr, Human Performance Technologist, American Express



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## 44 Tips for Working Successfully *continued*

1. Be prepared. Know in advance who at your organization will be working on the project and what role they will play. Know who needs to sign off and when, and then prepare your team for their roles. Communicate with your service provider as to who will be involved at each step, and who they can contact along the way.
2. When possible, have the vendor participate in review meetings. Although not every change will ultimately be made, the provider will be able to hear first-hand the user and reviewer comments as well as concerns, reducing any misinformation or misconceptions while making edits.

—Anne Scott, Training Program Developer, Sodexo

Make sure you have a statement of work (SOW) up front that clearly defines project scope, responsibilities, change orders, fees, and penalties. Have a project manager if the project is a large one. Even if the vendor provides a project manager, it is a good idea to have one on your side too to ensure timelines are met and communication channels are kept open. Make sure your vendor has access to all the resources they need, including you. Good communication is essential in any project. Talk early and often. If things are not going in the right direction, it is far easier to readjust early in the project rather than at final delivery!

—Watrous-McCabe, Elearning Consultant, Allina Hospitals & Clinics

1. Select the best possible project manager from your side.
2. Define clear milestones.
3. Request timely meetings (virtual or face-to-face) with the development team.

—Dr. Jasir Alherbish, elearning Consultant



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Service providers are just like you. They have schedules, deadlines, and probably a lot on their plate. Treat them with respect. Take the time to write a recommendation on their blog, LinkedIn, or on another venue. Help others learn more about what you have done together. Real relationships foster even more profitable partnerships.

—David Miller, multimedia developer, Newmarket International

Be honest and straightforward in your communications, and trust that both sides want the same outcome. If at any time you sense that the vendor is not solutions- or relationship-based, either ask for a different representative or walk away if you can. The best vendors sincerely want to partner in your success.

—Kristin Ford, Owner/President, PC Training Source

Be open and candid from the beginning. Service professionals want to do the right thing, and the more information they have the better solution they can provide. Work to have a trusted advisor relationship. There is a sea of options, and you need to be able to count on your service provider to help navigate the waters, net new ideas, and help you seek safe harbors when needed.

—Lisa Stortz, Strategic Relationship Manager, Allen Interactions

## 44 Tips for Working Successfully *continued*

1. Work with your service provider as a partner. Remember and respect that they are specialists who offer certain specialized services.
2. Always use voice-chats or telephone calls when you cannot meet them in person to resolve any issues, close discussions, or communicate feedback. Limit regular information sharing and updates to e-mail.
3. Hold weekly update calls to help both parties closely track the project.

—Geeta Bose, CEO, Kern Communications Pvt, Ltd.

1. Build cordial relations.
2. Respect the knowledge and expertise the person/organization brings to the table.

—Seethalakshmi Natarajan, Instructional Designer, Hillcrest Consulting Inc

Mix in-house-created materials and vendor-created materials. Have someone in-house create your e-Learning screens using Captivate 4 or Flash CS3/CS4, and then have the vendor tie them all together into the finished product.

—Beth McGoldrick, Curriculum Manager, RiverSource University (a division of Ameriprise Financial)



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Plan your work and work your plan. Before signing any statement-of-work (SOW) between you and your service provider, check and double-check for key project management staples.

- Are the details and timelines realistic?
- What do they expect from you, the client, and what is the estimated turn-around time on your side?
- What happens if they don't meet the delivery date?
- What check-ups do you have stated in the SOW so you know the project is on course?

By making sure these items are in the SOW, you make expectations clear and know what is being done by whom and by when.

—Steven R Yacovelli, Ed.D., Owner & Principal, TopDog Learning Group, LLC

Have a template and storyboard format ready to go. If you do not, you will need to allow the time for the e-Learning service provider to develop those items prior to creating your first project.

Check your content for accuracy prior to hiring the service provider, or allow time for updates once the material is developed.

Share samples if you have a vision for what you want the material to look like.

—Deborah Thomas, President, SillyMonkey LLC

Set detailed project plans that list all assumptions, acceptance criteria, final delivery file types, method of delivery, and escalation procedures. Escalation may be one of the most important items. If you have people waiting for an answer, there is no way to recoup that loss of productivity.

—Jay Krupp, Director, Educational and Custom Services, Newmarket International

*Clearly identify the project scope, and determine ahead of time what is in scope and what is out. Identify both the methods of communication and how you will do business. Ensure you stay on track with deliverables and timelines.*

— KELLY JUHASZ, PRESIDENT,  
JUHASZ DEVELOPMENT  
GROUP

## 44 Tips for Working Successfully *continued*

1. Give the time it takes for an ISD to understand. Money doesn't buy understanding. Spend the time to answer questions, make sure materials and people are available, and interact with them. Shortcuts can lead to disaster.
2. Hold the provider accountable to stay on task and not go for unnecessary fluff.
3. Insist they use a tool like Ignite that you can edit and maintain after they leave. You should not be left in a situation where you need an IT professional or a highly-skilled technical user to make edits and updates.

—Charles McGinnis, Technology Director, Abundance Software, LLC

Be organized. Their time is money, so know what you want from them. Then, listen to their ideas on how to produce it. They will have great ideas that you won't have thought of because it is their area of expertise. Use them for what you pay them for ... to develop the content, not determine the content.

—Amy Walton, Subject Matter Expert, Newmarket International

Make sure text is perfect when you give it to them! It is so much easier to make edits on your end prior to giving the work to e-Learning professionals, than it is to ask the professional service provider to make them for you after-the-fact.

—Linnaea Mallette, Training Coordinator, UCLA Office of Research Administration

Plan, plan, plan! Before engaging your e-Learning professional service provider, conduct an effective needs analysis and project definition, including as much information as possible about scope, time, and resources. Having done this preparation and planning up-front can prevent headaches and save money down the road. Remember the saying, "Fail to plan; plan to fail"!

—Michael Sunnarborg, Global Consultant, Target

Help them understand the learners better so they can tailor the learning experience for best results.

—Cindy Xiao, Instructional Designer, IBM

In the project kick-off meeting, explain to the vendor and the rest of the team how everyone will communicate, and how the project will develop.

—Beth McGoldrick, Curriculum Manager, RiverSource University (div. of Ameriprise Financial)

## 44 Tips for Working Successfully *continued*

- Provide clearly written guidelines and expectations.
- Keep them informed of what is going on, especially for changes that affect the schedule. They have to juggle their schedules with other clients.
- Let them know when you receive items they send, especially when sent as e-mail attachments (e-mails with attachments are more likely to be caught by spam filters).
- Let them know if they provided what you expected.
- Let them know you appreciate their efforts.
- Do everything you can to pay them in a timely manner, and keep them informed of your efforts to follow up on any problems.

—Debra Baxter, Writer & Editor, Baxter Writing Services

- Ensure the provider you select understands your business and your e-Learning goals.
- Select an internal team with a SME who can work directly with the provider. The more knowledgeable this team is, the more productive the project.
- Insist on weekly communication and team meetings.
- Let the provider do the heavy lifting by being accountable to you for all deadlines. Establish this communications plan prior to signing a contract. The last thing you will want to do is to have to track down your provider for a status update.
- Ensure your provider presents you with a detailed project plan or strategy document that outlines all decision points and outcomes. This will ensure that you are in control of your project, as well as providing clarity to your provider.

—Kelly Lake, CEO, WorldLearn

Relationship marketing is very important. Long-term relationships create the mutual understandings required for working successfully. But there is a need to update providers, as well. We have to be vigilant with our providers in terms of service, and financial situation, as well as completion. We must continuously review our agreements, strategies, and processes. You can use database management to understand and analyze these factors in a systematic and developmental way.

—Nalin Abeysekera, Lecturer, Open University of Sri Lanka

Make sure your contract and procedures outline clearly everyone's roles and responsibilities. Define deliverables, deadlines, and performance criteria, and spell out consequences for less than satisfactory performance.

—Carol Stoil, Learning Development Specialist, Bureau of Engraving & Printing

Find a provider with expertise in your market. Define the review team, and provide timely reviews. Do not show it to your boss or VP the day before it is due.

—Stephen Colucci, CEO, Interact Medical



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## 44 Tips for Working Successfully *continued*

Ask for examples of the design and development deliverables so that you understand at what point various types of input are appropriate. For example, you need to know that the time to give input into the navigation, architecture, and the nature of the graphics (e.g., the level of realism) is early in the design phase. Make sure your e-Learning instructional designers and developers understand your business and performance objectives, and are committed to helping move you closer to them.

—*Esther Bergman, Consultant, Benchmark Performance Inc.*

Be candid and up front about what you know, what you do not know, what you need, want, and expect. Then listen carefully and take detailed notes. Keep this information easily accessible for future administrations. Explore all of your options, and be clear about what is realistic with your current situation. Make sure you continuously update your needs and knowledge about what changes your service providers are making and planning.

—*Marie Ortega de Ortiz, CPM, Ed.D. (abd), Director of Training, Kansas Juvenile Justice Authority*

- Ask them to review the SOW with you.
- Ask about all the resources, paid and unpaid, that they offer.
- Keep in constant communication.
- Ask them for project updates.
- Clarify, clarify, clarify.
- Ensure that you are bringing the perspectives of all your stakeholders to the table during meetings with the vendor. Do not have the meeting if you do not have proper cross-functional representation; instead reschedule it.

—*Faith Legendre, Sr. Global Consultant, Cisco Systems, Inc.*

Know what you want as precisely as possible and then listen to what is suggested. Listening doesn't mean accepting, either in whole or in part, but honest listening opens up a world of possibilities that will allow you and the provider to succeed beyond expectations. Clarity of purpose, in conjunction with intentioned listening and learning, back and forth, will make the relationship work effectively and efficiently.

—*Paul Pinkman, owner, Paul Pinkman Creative Design, LLC.*

State your needs clearly. Use an analysis, design, development, implementation, and evaluation (ADDIE) approach to break it down, and clarify in which step, and to what extent, they are going to provide their services.

—*Jorge Oceja, Instructional Designer, San Jose State University / Synaptics*

## 44 Tips for Working Successfully *continued*

1. Get stuff in writing.
2. Ask for process up front.
3. Provide materials on time.
4. Meet and discuss project.
5. Scope it out.

—Jeff Krebs, Senior Educational Consultant, GE Healthcare

Collaborate, stay involved in the process, make sure there are adequate upfront briefings before a project starts, have proper checkpoints weekly or bi-weekly, and an organized debrief at the end of a work cycle to help capture what is working and why, and what needs to be improved and why.

—Burke Allen, CEO, NovoLogic, Inc.



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Find out what method and time for communicating with them is best. Some individuals are easily reachable by phone, others by e-mail or a posting on a project portal. Some providers work late, others could be working weekends. If they are offshore, keep in mind their hours and holiday schedule may not coincide with yours. When developing a project plan that includes major milestones, ask about times they will be unavailable.

—Sabrina Curry, Instructional Designer, The Nielsen Company

If you are using off-the-shelf courses, but must have customizations, first research if there are resources to do the customizations in-house. Customizations can be very expensive, but some e-Learning vendors provide hosted course-authoring tools in which you can edit the course yourself, at no extra cost. If they provide this, they will usually provide some level of training on using the authoring tool. Another alternative is to request the source files. Vendors may have resistance to this, so you will probably need good negotiation skills, and you may need to remind them you are paying for those courses. Then you will need the same software in which they developed the course and the skills to make the changes.

—Jeffery Goldman, e-Learning Designer, Provident Bank

Want the benefits of being someone's favorite client? One of the biggest problems service providers face is scope creep. Quickly become a favorite by defining your project as clearly as you can, and clearly communicating (and documenting!) changes when and if they are necessary.

—Roger Courville, Principal, 1080 Group, LLC



*“Being able to take the talent we have in select offices and extend it across country without having to fly across is a big deal for me and others. I have a lot of certifications and specializations. I used to need to travel at a moment's notice to train customers, which made it difficult to do other things.”*

*– Director of Technology Services,  
Consulting Firm*

*“We have a huge training issue for our software; web conferencing has solved that.”*

*– Software Architect, Financial  
Services Firm*

*“Web conferencing reduces not just our travel costs, but the costs to our customers for training.”*

*– VP Technology, Consulting Firm*

*“Over the course of a day I can be in four different time zones without jet lag, it's fantastic.”*

*– Sr. Business Development Specialist,  
Financial Services Firm*



## Shifting Training to Online Learning: *Extending Reach, Improving Productivity, and Keeping Learners Involved*

Many businesses have harnessed the unique capabilities of web conferencing to move formal and informal training to the World Wide Web. Web conferencing extends reach, increases productivity, involves learners and subject matter experts not otherwise available, and helps an organization package training in bite size chunks. But do the benefits go deeper? What are the best approaches to using web conferencing for training? Are there particular tricks of the trade that can be replicated?

To find out exactly how web conferencing can work in practice for training and other applications, how one best implements, and what to expect for results, Wainhouse Research conducted a number of in-depth interviews with companies that use web conferencing every day. The findings provide direction to any business seeking to improve its training activities through best practices.

	In-Person Training	Online Training
Prepare	Create Training Materials	Create Training Materials
Schedule	Schedule / Pay for Customer & Employee Travel	Schedule Online Training Event (web and voice)
Deliver	Local / Remote "brick-and-mortar" event	Web Class / Seminar
Learner Practice	Demonstrations / Simulations Workbooks	Demonstrations / Simulations Application Sharing / Breakout Rooms
Test	Paper or Software Test	Online Test
Follow-Up	E-mail or Phone Contact	E-mail / Phone / Archived Material Review /Web Session Review
Measure	Satisfaction Survey	Online Sat Survey

## In-Person vs. Online Training Exponential Knowledge Transfer

Trainers and anyone responsible for knowledge transfer to internal and external audiences are all too familiar with the usual methods of delivering training: travel to one or more locations, ship equipment and/or training materials; hold a training event; test learners; and, if time permits, conduct follow-up after the class has ended. Traditional training frequently requires someone to travel, whether it is customer, employee, and/or trainer. The traditional approach to training requires a large investment of time and personnel and is not very scaleable. Brick-and-mortar events call for physical space, an extended training team, and significant loss of productivity based on travel time. Many companies find it a burden to deliver in terms of expense, and in fact may stint on training as a result. Ultimately the costs, challenges of measurement, and ability to get customers and employees up and running can be severely impacted.

Online training completely changes the mix in terms of training delivery. Online training takes a different approach by enabling the multi-tasker extraordinaire. It lets a business be wherever it needs to be. It allows just-in-time and scheduled delivery — by the subject matter experts who know best — of whatever a service or product needs to be effectively learned and understood. Some of the benefits of online training are obvious; the top three are saving travel costs, the ability to involve those who otherwise could not attend, and increased productivity through saving time away from the office. Other benefits uncovered in our interviews are more subtle. Greater sustained interactivity with learners over time, better service to customers, increased geographic reach are all benefits of using web conferencing for training. For many the benefits are so profound that the technology now plays a critical role in their overall workflow, touching not just training but also sales, marketing, and operations.

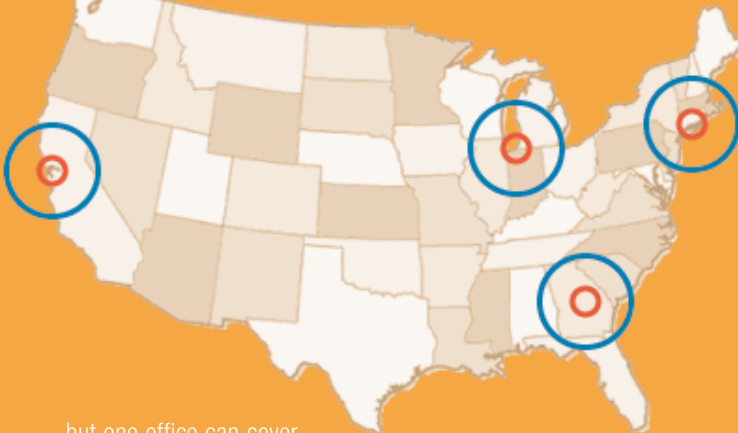
*“Our training and help desk costs would be greater without web conferencing. For hard-to-use applications and complex subjects, we could lose the entire cost of a year of web conferencing in terms of our added overhead for training. We probably fly people less often now for major releases.”*

– Software Architect, Financial Services Firm

*“We have 70 partners who resell our products. About 5,000 people use our website, such as insurance agents who use our products. We have once-a-month trainings and do webinars with expert guests every month.”*

– President, Financial Services Firm

Trainers can cover only so much physical territory by car (red) or by plane (blue) in one day ...



... but one office can cover the entire country using web conferencing.

*“We set up customers for sales presentations and training. In our profession, it’s unique. None of my competitors offer that same hands-on experience that I know of.”*

– Sr. Business Development Specialist, Financial Services Firm

*“For any consulting engagement that is remote, NY or China, one of the first things we will do is use GoToMeeting for the kickoff. Then we schedule training sessions, all using GoToMeeting. It is the ONLY way we touch the customer.”*

– VP of Technology, Consulting Firm

*“We conduct internal training; it started with our software group doing custom in-house training on new releases. We conduct lots of 1-1 sessions.”*

– Software Architect, Financial Services Firm

## Making the Transition

### *Tips from Those Who Have*

When it comes to making the transition, our interviews revealed that there are two different strands of behavior as represented by two types of organizations. One group, which we call “Planners,” takes pre-determined steps, both large and small, such as holding demonstrations and “train-the-trainer” sessions to ensure success. The other group, the “Divers,” fearlessly dive in to applying the technology, quickly integrating it into the workflow by using it aggressively (and typically needing to get burned once before understanding the importance of practice). We believe neither approach is right for all situations, but that those involved in formal training roles will gravitate towards the “Planner” approach, while those who have informal roles conducting knowledge transfer will gravitate towards the “Diver” approach.

Most companies start small by obtaining a few licenses with the goal of gaining an understanding of how web conferencing will fit into their processes - and whether being a “Planner” or a “Diver” works for them. Early success is then built upon. Many users buy sufficient licenses to accommodate demand; you may need to purchase each trainer a unique license, if for no other reason because sessions often will be ad hoc as well as scheduled. Trainers need to be able to respond ad hoc to learners in need.

*“We were training 1600 users of our software who are not technically advanced. It was a huge challenge as we used to go and visit them! We had to hire more people, travel more. Then we created an online university, with monthly topics, plus orientation classes for first time users.”*

– Director of Business Development, Software Development Firm

It is important to appreciate that web conferencing is a different communication medium. Know your audience: they are busy adult learners who are bringing you into their offices - thus they are in control. You may face “competition” from the phone, email, IM messages, and people dropping in. Thus it is essential to retain their attention by keeping lessons short, briskly paced, engaging, and to the point. Paying attention to the following details will also help: slide design (keep simple, use graphics instead of text bullets, do not read the slides – tell the story “behind” them) and use of

pointing and annotation to emphasize key points. Ask poll questions and encourage questions via text chat to engage the audience. Always maintain interactivity — the most essential ingredient to working with remote learners.

*“Be aware - know what you want to say and keep it short (30-45 min max); learn the hints that indicate when they've become disengaged.”*

– VP Operations, Software Development Firm

*“I appreciate webinars where there is some sort of interaction to keep the audience engaged. We open up phone lines so people can ask questions. Normally people (are) in listen-only mode, but we have had to change to add a panelist number so people can speak to us. That's important.”*

– Marketing Specialist, Consulting Firm

Mastering the technology is the easy part. Appreciate that web seminars are “showtime.” Just like a physical event, practice is critical. Script who will play what role, run through what they will present, and rehearse any presenter hand-offs.

*“I should have practiced once or twice, but I didn't. Fumbling on practice time, not real-time is important.”*

– President, Consulting Firm

Work with your teams to encourage them to use web conferencing as a tool, and follow up. Web conferences are part of a larger interaction process with clients — they are a means to an end.

*“It's nice to reach out to a client and help, but I encourage our team to have a client share the keyboard and mouse, and for us to show clients how to do steps, and make the client go through the motions to learn it. Passing control back and forth is important to teach clients how to fish on their own.”*

– Director of Technology Services, Consulting Firm

*“Using web conferencing for training is an art and there is always room for improvement. Be sure to close the loop and, in the process, gather feedback. After every webinar we survey our attendees; we have them rank it, then ask for comments for improvement. For those who weren't satisfied, we try to dig in to see what we could do to improve. We also make sure it's valuable to our members, we survey to find out what they want help with.”*

– Marketing Specialist, Consulting Firm

## What to Look For The Features That Make a Difference

A Wainhouse Research survey of more than 500 trainers revealed that the most important web conferencing features are ease of use, reputation of vendor, and customer support. These findings were reinforced by our interviews.

*“The performance of real-time screen sharing is very important for online demonstrations.”*

– Director of Business Development, Software Development Firm

*“Often when customers call us, I right click, and within 2 seconds we’re online. That feature is very nice. No need to log-in on a website.”*

– VP of Technology, Financial Services Firm

*“Use a simple offering so that the users can train themselves.”*

– VP Operations, Software Development Firm

The ability to pass meeting control is important for multipresenter seminars, while remote control can help with hand-holding customers through a hands-on demonstration. In addition to the listed features, “all-you-can-eat” pricing that is charged on a per seat basis gives your trainers the ability to use web conferencing at any time without worrying about any additional cost penalty.

## It’s Not Just about Replacement

Web conferencing is not about simply “replacing” in-person training. It is a different tool — a supplementary tool — with its own set of unique advantages. Implemented correctly, it can supplement or replace traditional training — especially in the area of timeliness. This can result in increased customer satisfaction, more satisfied learners, and a competitive advantage.

*“More important: We give better service to our customers – which gets the word around the industry. Satisfied customers get us more business.”*

– Director of Business Development, Software Development Firm

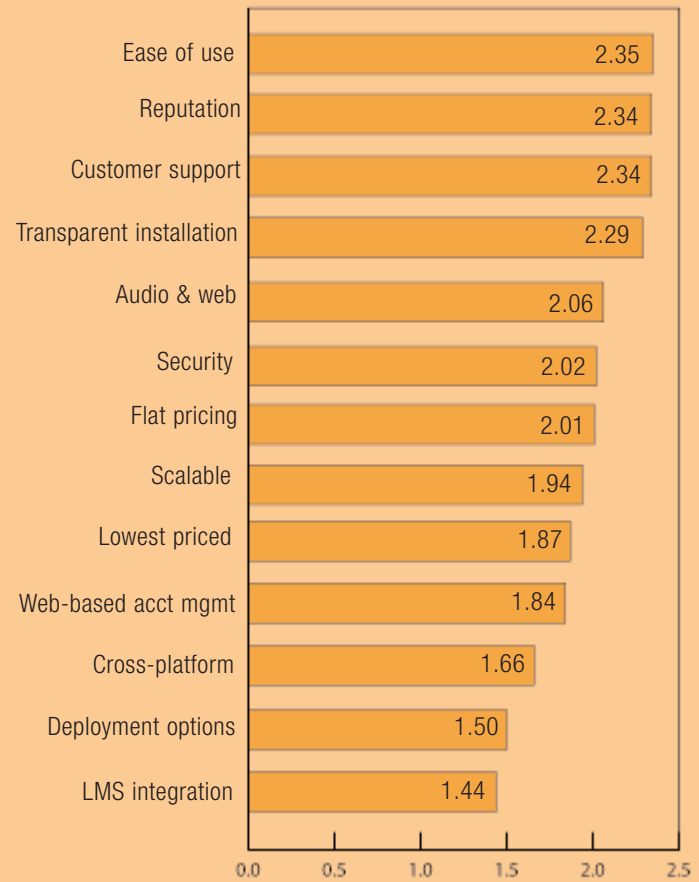
### About Wainhouse Research

Wainhouse Research, [www.wainhouse.com](http://www.wainhouse.com), is an independent market research firm that focuses on critical issues in rich media communications, videoconferencing, teleconferencing, and streaming media. The company conducts multi-client and custom research studies, consults with end users on key implementation issues, publishes white papers and market statistics, and delivers public and private seminars as well as speaker presentations at industry group meetings. Wainhouse Research publishes a variety of reports that cover all aspects of rich media conferencing, and the free newsletter, The Wainhouse Research Bulletin.

### About Citrix Online

Citrix Online, a division of Citrix Systems, Inc., is a leading provider of easy-to-use, on-demand applications for Web conferencing and collaboration. Its award-winning services include GoToMeeting Corporate, a complete collaboration solution that satisfies all Web conferencing needs ranging from large Webinars to small online meetings. With GoToMeeting Corporate, organizations of any size can use GoToWebinar for do-it-yourself Web events and GoToMeeting for smaller, more interactive online meetings. GoToMeeting Corporate allows users to easily present, demonstrate and provide training online to anyone, anywhere in the world. GoToMeeting Corporate can make businesses of any size more productive by reducing travel time and costs and enhancing communication, ultimately leading to faster decision making and more efficient workers. For a free evaluation of GoToMeeting Corporate, please visit [www.gotomeeting.com/s/WRReval](http://www.gotomeeting.com/s/WRReval).

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WR survey of over 500 trainers, December 2006

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March 3, 2008

The eLearning Guild's

# LEARNING SOLUTIONS

Practical Applications of Technology for Learning

e-Magazine

## Improve Outsourced e-Learning Quality with Consistent Standards

By Evelyn Jackson

**A**re you a learning development professional who struggles with increasing your customer's satisfaction for your online training? Does your organization outsource course development to a variety of vendors, only to receive mixed results in terms of quality and cost? Is your management putting pressure on you to deliver courseware faster and cheaper? If so, I'd like to show you how Microsoft's Sales Marketing Services Group Readiness (SMSGR) organization has developed solutions for these issues.

SMSGR is a training organization in Microsoft comprised of approximately 150 individuals located in regions all across the world. Our headquarters are in Redmond, Washington. Within Microsoft, SMSGR is responsible for improving performance of the "Field" employees, approximately 32,000 sales, services, and marketing professionals throughout the world. SMSGR Readiness offers dynamic, innovative, and high-quality learning opportunities.

Our learning programs assist the Field employees in delivering on their commitments, being more productive, driving results, and growing their careers. Through strong partnerships with learning and readiness teams across Microsoft, SMSGR drives a learning platform that consolidates all required and optional training from across the company, and makes it available to the Field. Individuals can achieve learning objectives through a variety of methods, including attendance at SMSGR-powered events, participation

in instructor-led or online classes, and completion of self-paced instruction. In addition, we constantly update Field readiness resources with new and timely content, such as solution selling strategies, discussion guides, and Live Meeting recordings for topics relevant to specific disciplines.

To complement Microsoft Field's Career Development Plans, SMSGR provides valuable tools, such as Role Guide™ and Career Compass™, that help individuals prioritize learning opportunities and create an individually tailored, holistic training roadmap. This, in turn, allows employees to deepen skills in their current disciplines, and develop new competencies that pave the way toward professional growth and career advancement. Furthermore, Field employees can self-assess whether a learning opportunity is worth their time, or, conversely, test out of courses that cover content that they already know.

*Any e-Learning organization should spend time and effort to identify ways to improve the service it provides to its customers. However, this is often easier said than done, especially when the organization outsources design and development. In this week's article, you will find a blueprint for the process that an internal Microsoft group uses to deal with these issues. This is a process that you can scale to your own situation, in order to better serve your organization.*

A publication of

Management Techniques

**Business problem**

This year we enhanced our delivery of learning programs to the Field by addressing several customer issues, and by developing a simple and easy-to-use interface for our online courses. In order to improve our services, we conducted interviews with our customers, collected feedback in business meetings, and made an analysis of our help-desk service requests. We discovered several business issues that we needed to address:

- The quality and consistency of our courses
- The cost efficacy of our outsourced vendor model
- The customer experience
- Customer satisfaction
- The maintenance of our learning programs

**Course quality: Customer experience and satisfaction**

At SMSGR, we outsourced the development of our courses to more than 50 vendors. Consequently, we were delivering courses that varied significantly in design, navigation, and adherence to accessibility best practices, compatibility with our learning management systems, assessment strategies, and aesthetics. Each vendor designed their courses in a unique style. Our customers complained that for each on-line course they had to learn *how* to take the training before their learning could begin. We were also experiencing inconsistent adherence to Microsoft style guidelines and accessibility best practices (i.e. compatibility with the Section 508 of the Americans with Disabilities Act [ADA]). Sometimes the results were unacceptable. Customers were also concerned with the length of courses, and how much of the material was directly applicable to their role. For example, one online course was one hour in duration, but only 15 minutes was applicable to the customer's specific job.

Our SMSGR professional curriculum managers are dedicated to improving our courses by implementing best practices from lessons learned in previous courses. However, we noticed that adoption of best practices was on a course-by-course basis, and implementation of innovations was not shared across the curriculum. While these complaints applied primarily to our online courses, we received similar complaints about the inconsistent approach to the design and curriculum of instructor-led courses.

**Cost efficacy**

Managing the overall cost of building high quality and engaging training experiences is essential to maintaining our ability to maximize SMSGR productiv-

ity and output. With more than 50 vendors, we struggled with the variance in quality and cost of their deliverables. Engaging vendors became challenging and risky, as we relied on their design and development skills to meet our customers' needs and our deadlines. It was clear to us that we needed a means to identify vendors that have high quality products and services, that map to SMSGR's requirements, and that have agreed to align with SMSGR's business model. We needed to achieve long-term cost efficiency by aligning the vendor to SMSGR standard rates for delivery and development. We also needed to focus more on sound instructional strategies, on accessibility, and on other aspects that would come with a standardized approach to delivering learning, and less on compatibility with our platforms.

**Localization**

SMSGR delivers courses to a worldwide audience. While English is the primary language for course delivery at Microsoft, it is frequently necessary to offer courses in a variety of languages. When we needed to localize courses, whether they were online or instructor-led, the courses required re-programming

*In order to improve our services we conducted interviews with our customers, collected feedback in business meetings, and made an analysis of our help-desk service requests. We discovered several business issues that we needed to address.*

**Table 1** Summary of business issues and SMSGR solutions

Business Problem	Issue	Our Solution
Course quality: customer experience and satisfaction	Customers have to learn the interface before they can begin to learn the content	Common user interface and navigation components
	Adherence to Microsoft styles and accessibility standards	Embed style and accessibility components in a standard courseware format
	Applicable content to customer role	Standard course template with individualized tracks for roles and test-out feature
	Best practices implemented as one-offs	Standard instructional design and assessment strategy
Cost efficacy and localization	Disparate vendor quality and costs	Standard templates for courseware, and require vendor certification
	High localization costs and work effort	Embed localization standards in courseware templates
Maintenance of learning programs	Large volume of service requests with LMS compatibility issues	Embed standards for courseware programming and back end functionality with SMSGR LMS through consistent exit button, embedded APIs, and course status recorded frequently to LMS

**Management Techniques**

or repackaging of the instructor-led course materials. There was no single way to cost-effectively translate courses that did not require the course to be rebuilt.

**Maintenance of learning programs**

We have an e-mail alias for all of our learning programs. This serves as our help desk for our learners. We were receiving hundreds of service requests per month for support on course registration, access to materials, video speed to download, assistance on the functionality of online courses, and course completion status. To resolve most of these issues, the help desk team would have to consult with the SMSGR curriculum manager, who would have to contact the vendor that developed the course. Most of the time, the vendor had to do research and work with our Learning Management System (LMS) team to determine what was causing the issue before they could resolve it. A common occurrence was that the course was incompatible with the LMS, and not relaying or recording course completion status properly. Uncovering the root of customer issues was a long process, and customers were obviously dissatisfied with the response time. It was also a frustrating process for our internal staff.

**Our solution**

After carefully listening to our customers, we determined one solution that would alleviate most, if not all, of these issues for us. Our approach was to provide a consistent and high-quality SMSGR courseware format, with the same “look and feel” for courseware across multiple modalities, to provide a consistent user experience. This solution encompassed setting standards for a number of things:


- Course knowledge levels
- Instructional design
- Assessment strategy
- Branding
- Localization
- Vendor engagement
- Courseware materials
- Courseware programming
- Back end functionality of the online courses

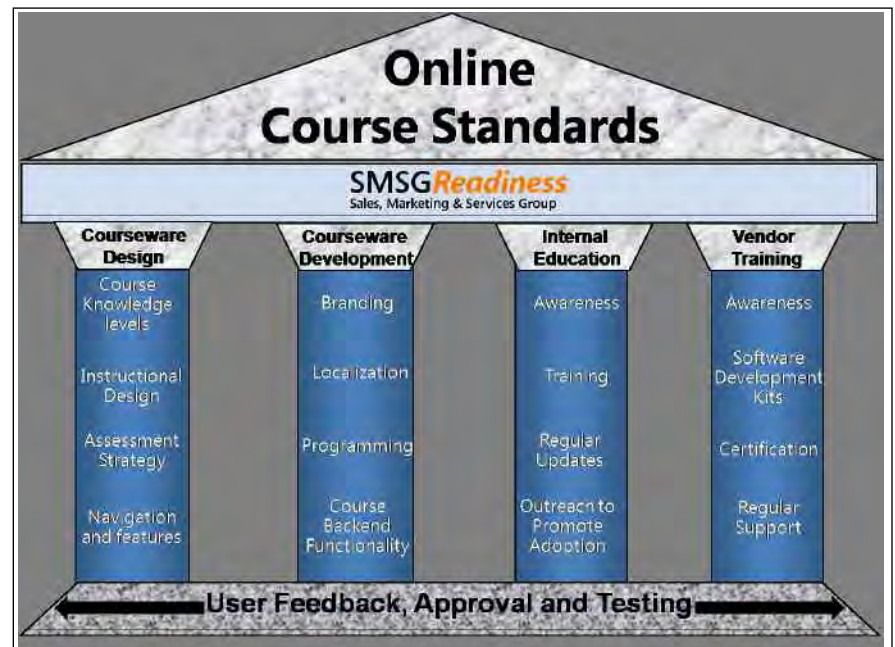
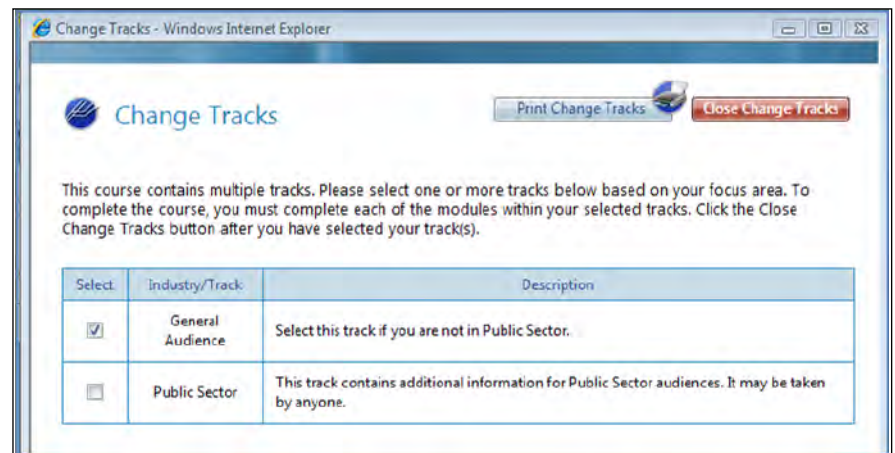
Table 1 on page 3 outlines the business issues, and how we solved them in the design of our solution. To improve learner satisfaction in the online course experience, we developed a common user interface that employs a standard instructional design with consistent navigation elements. Our course template can contain multiple learning tracks based on role or industry (see Figure 1). The implementation of these elements provides the learner with a predictive experience all the time, no matter who develops the course.

There were two ways we were able to address the issues of disparate vendor quality and costs. First, by producing a standard template and requiring vendors to use it, we were able to control the quality of the online course in terms of design and navigation. Secondly, with a programming standard we can minimize the time and resources required to translate a course into another language, thus reducing our costs. We also implemented this approach to improve our ability to maintain our learning solutions.

**Implementation**

We formed a SMSGR virtual team to guide the development and implementation of our solution. Our virtual team consisted of several different curriculum managers, members from our platform team, and a few vendors to support our development and testing

 **Figure 1 Multiple tracks within the same course**



**Figure 2 Microsoft SMSGR Standards Team work streams**

## Management Techniques

of the online template. As depicted in Figure 2 on page 3, we identified and conducted several simultaneous work streams for this project. The courseware design component of our solution focused on setting standards for course knowledge levels, instructional design, assessment strategy, and navigation design. Led by our learning strategists, we developed specifications and definitions for various course levels including fundamental, intermediate, advanced, and expert knowledge levels. Each level was defined by description, learning objectives, assessment strategy, and content design guidelines. We held meetings to introduce these to our curriculum managers, made revisions, and received executive approval for implementation.

In order to address courseware development standards, we concentrated on branding, localization, courseware programming, and back end functionality of the online courses. For these efforts, we leveraged our vendors to help develop the template to our specifications. We began with a first version of the online template that we released in July 2007, and then continued to make improvements on the template based on feedback from our users' tests with our Field customers. We released a series of software patches, as we incrementally improved the template. Four months later, we released our second version with additional navigation and user interface features.

I must admit we were literally building the plane at the same time we were trying to fly it. I am sure you can identify with this if you have been working in training for any length of time. The key to our success was dedicated executive support, a terrific project manager, very talented team members, and our ability to be very agile.

Our third major area of concentration was internal communication and education. This work included creating awareness among our stakeholders, training on the template, providing regular communications on progress, and promoting our template to other Microsoft readiness organizations. We held workshops, live meetings, and briefings to educate our internal SMSGR curriculum managers on the instructional design requirements, assessment standards, and the new online template.

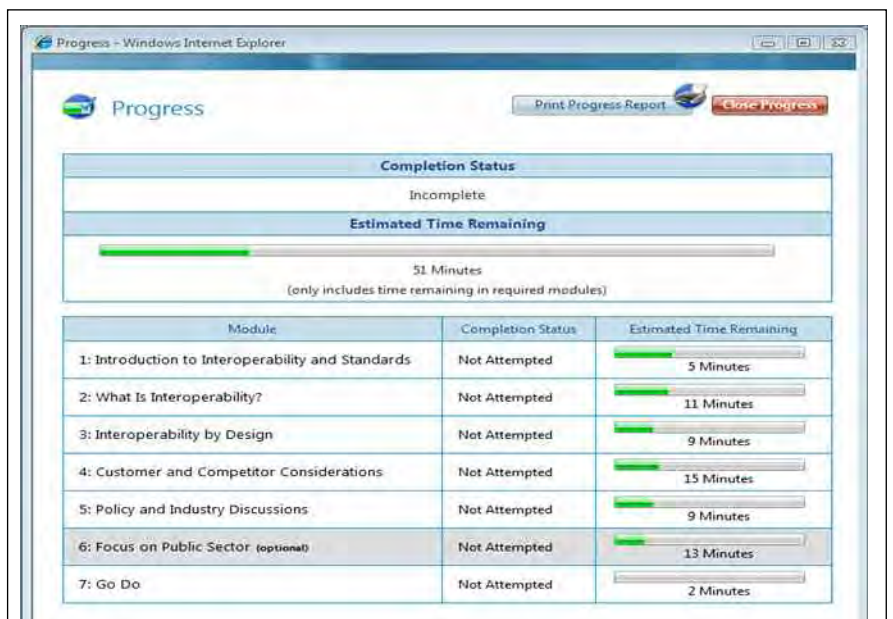
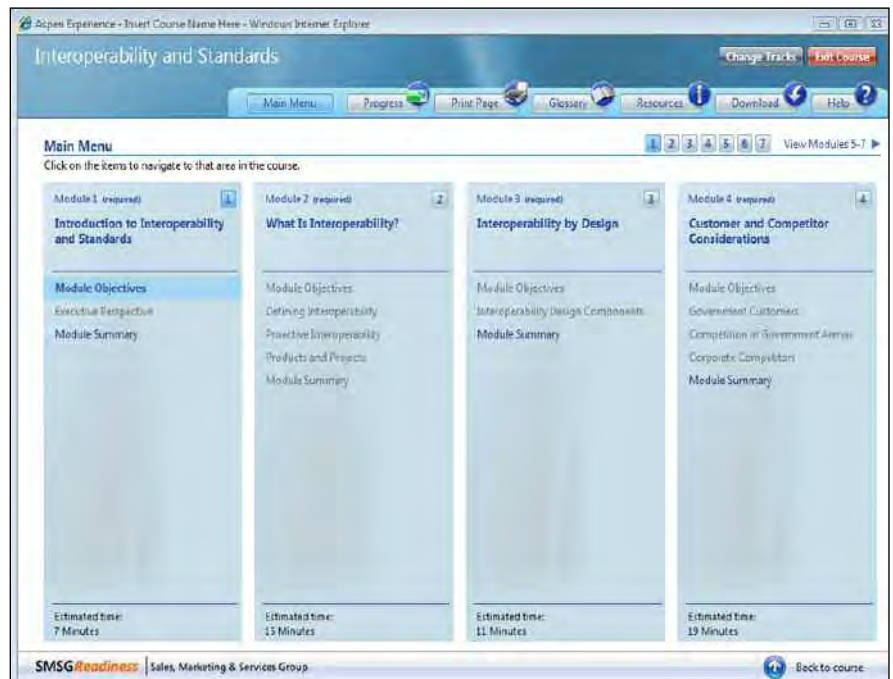
To date, we have trained approximately 230 people on the standard online template. Because of our promotional efforts across Microsoft, we have six other readiness organizations adopting our online template. Course developers outside SMSGR have produced more than 20 courses utilizing our template.

The fourth major effort, and the most time-consuming task, was educating our vendor communities. It was critical to our success that we train our vendor

pool on the new course standards. First, we developed a vendor portal, a process for communicating to our vendors, and software development kits for the template. We notified vendors that in order to continue to do business with us they would need to prove they could master the online template.

We then set up a certification process that required vendors to produce a sample course in our template, and submit it for our approval. In turn, we provided software development kits, documented instructions,

**Figure 3** The SMSGR template Main Menu



**Figure 4** Progress tracking for the learner

## Management Techniques

and e-mail support for questions. We held regular office hours to support the certification process. Our virtual team would test the course and review the programming to ensure it met our guidelines. We have trained and certified more than 25 vendors in our SMSGR online course template. Our vendor management lead continues to hold weekly live meetings and office hours for vendors learning and developing in our template. Within SMSGR, we have released more than 100 courses in our online template.

In the six months between July 2007 and February 2008, we developed, tested, and released a simple and easy-to-use SMSGR-branded online course template programmed in HTML with these integrated features:

- A Main Menu that provides a “due-North” all-up view of the course modules and topics (see Figure 3 on page 4)
- A scalable template that can accommodate 1 to 500+ pages in 1 to 12 modules
- A progress window that presents real-time progress information (see Figure 4 on page 4)
- Video encoding and playback standards
- Variable video playback speeds: .75x, 1x, 1.25 to all courses
- Test-out feature that provides opportunity to demonstrate proficiency without clicking through a course
- “Tracks” give users the ability to select focus areas
- Captioning and transcripts, available navigation with keyboard, intelligent use of audio, and adherence to Section 508 of ADA best practices
- Localization and regionalization designed into the template; template is pre-localized in Japanese
- Capability to take away the complete course content as a OneNote or Microsoft Word document, so learners could leverage the content at any time without having to go back to the online course

Finally, we were able to resolve company course-maintenance issues by embedding enterprise-ready application programming interface (API) requests into the course template. By improving the writing of user status to a LMS, so that it happens frequently, and network interruptions don't affect the learning system's ability to track the user's status, we were able to reduce help-desk support. Another simple fix that resolved issues of user tracking and completion status was making consistent navigation, with the Exit Course button in the same place every time.

### Benefits

Through the standardization project in SMSGR, we have addressed and resolved all of the business issues we targeted. According to SMSGR General

Manager, Dustin Grosse, “Our customers are providing positive feedback on their experiences on our platform, and the net satisfaction scores and readiness metrics are continuing to increase as a result of the work that is being done in this area.”

By providing a consistent user online experience, our customers can get down to the business of learning and not have to waste time with learning the navigation. Through features such as the progress window, our customers know how much time they need to invest as they complete sections of the course.

Our consistent approach has drastically improved our customers' satisfaction in checking their knowledge of the course material. By providing multiple tracks of the course, differentiated by customer role or market focus, and a consistent module listing calls of action for customers, we have given time back to the customer and we deliver just enough training for each role. Finally, the test-out feature added to our courses permits our customers to determine whether they need to take the course.

We have realized many benefits with our outsourced vendor model. By requiring vendors to use, and be certified, on the template, we have improved the overall quality of our online courses and reduced the time it takes to develop them. As such, we are gaining more predictability on the costs required to produce an online learning solution. Our online template is now maximized for localization such that we can quickly turnkey the translation of course content, and quickly provide a localized course. This helped us compress localization cycle time and reduce costs.

The standardized courseware template has enabled us to reduce the risk when engaging so many vendors. Jordan Montgomery, SMSGR Manager of Analytics and Vendor Programs, explains, “The outcome of implementing standards is truly a win-win scenario for both the vendors we work with and our organization. The decision to implement standards was well received by our vendors. They quickly recognized the benefits of a consistent approach that provides the opportunity for a predictable and efficient engagement with our organization. They also appreciated that the standards enable the vendor to direct the majority of their time and energy to building strong content that is effective in achieving the targeted learning objectives, which is where the vendor is able to add the most value. Standards-certified vendors are able to apply their deeper understanding of our learning strategies, and their demonstrated proficiency with our tools and processes, to streamline the end-to-end solution design, develop, and deploy process, and hit the target on the first attempt, reduc-

*After carefully listening to our customers, we determined one solution that would alleviate most, if not all, of these issues for us. Our approach was to provide a consistent and high-quality SMSGR courseware format, with the same “look and feel” for courseware across multiple modalities, to provide a consistent user experience.*

## Management Techniques

ing the time and cost required to build and deploy the learning solution. So the resulting benefit for SMSGR is the ability to engage standards-certified vendors with a higher degree of confidence that the vendor can build and deploy learning solutions in a manner that meets our commitment to achieving significant business results through effective learning programs, while also deploying those programs on time and within budget."

As mentioned earlier, we were able to reduce the amount of resources and effort required to provide user support for our online courseware. SMSGR Director of our Learning Platform, Jim Federico, summarizes the impact our standards project has had on the maintenance of our learning solutions, "By listening to our customers, and leveraging off-the-shelf Microsoft technology, we have been able to ratchet up our impact while dramatically improving our ability to consistently deliver high quality and engaging learning experiences. It is not often that an idea so simple can have this significant an impact."

### Future directions

As I mentioned at the beginning of this article, SMSGR keenly focuses on improving the performance of worldwide sales, services, and marketing professionals by offering dynamic, high quality, and innovative learning opportunities. The implementation of the SMSGR standard template has created a venue for a consistent, predictable customer experience, and that has resulted in improved levels of learner satisfaction. It is important to note that standards do not always translate to removal of innovation and creativity. We have been very careful to leave ample room for creativity in our template. Our virtual team was committed to balancing consistency and creativity in the design and implementation of our standard template. Vendors can integrate virtually any design and interactivity they desire inside of the template.

The SMSGR Standards project has taken on a new life of its own. Through this project we have identified other improvements that will make our services even more valuable to our customers. We are dedicated to providing our customers with dynamic and innovative learning opportunities. As we embrace our new standards approach, we are working to apply it to multiple modalities. Our team has already developed, tested, and released an instructor-led template for facilitator's guide, student workbook, and PowerPoint presentations. In the spirit of accommodating different media elements, we developed a one-page SMSGR online template to accommodate the publishing of self-contained instructional content, such as stand-alone

videos, recorded live meetings, and job aids.

As we enter the next phase of this project, we plan to add sizzle to our training by leveraging Microsoft® Silverlight™ technology. We are adding collaborative capabilities within our courseware that enable individuals to collaborate peer-to-peer, and within the context of a learning community. The SMSG employees are particularly excited about an innovation we are building that enables them to take, offline, any course produced within the template. The offline scenario enables learners to synchronize their progress and completion status the next time they connect to the corporate network. Going forward, we plan to leverage advances in Windows Mobile that will enable our occasionally-connected workforce to be productive, even during downtime. Additionally, we will expand the test-out feature to allow for testing out on a module-by-module basis within a course, allowing for a higher level of adaptive learning.

Tom Moretti, SMSGR General Manager of Planning, Design, and Development, describes our future plans and vision by saying, "SMSGR has made great strides in raising the quality bar of our online courses through the use of the standardized course template. We'll continue to add new innovations to the template in response to our Field customer feedback and needs. We envision an environment in the near future where our Field personnel in sales, marketing, support, and services can effortlessly incorporate learning into the very fabric of their daily work tasks. We can enable them to leverage high-quality learning that is relevant to the individual and the task, while being available at the right time, the right place, and on the right device. This is how learning should be in any company. We live in a dynamic world, and our learning should be part of that dynamic environment." 

### Author Contact

Evelyn Jackson is the SMSGR Curriculum Manager for Competitive Initiatives at Microsoft Corporation. She has over 20 years of experience in consulting and development of learning solutions, the last two and a half of which have been at Microsoft Corporation. Prior to her present role, Evelyn served as the Senior Manager of Learning Solutions for Communications, Content, and Cable industries at KPMG Consulting (now BearingPoint), and as an Associate Professor in Communications and Corporate Training. Contact Evelyn by e-mail at [evelynj@microsoft.com](mailto:evelynj@microsoft.com), or phone her at 425.707.1804.

*[W]e were able to resolve company course-maintenance issues by embedding enterprise-ready application programming interface (API) requests into the course template. By improving the writing of user status to a LMS, so that it happens frequently and network interruptions don't affect the learning system's ability to track the user's status, we were able to reduce help-desk support.*

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