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LEARNING

E-Learning Strategy:
A Framework for Success

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An IT department recently asked me to develop an e-learning course about one of their applications. One of my first steps was to contact the Training Manager of that organization and ask her what type of course would fit into her e-learning strategy. "What do you mean by e-learning strategy," I heard on the other end of the phone. I started to explain, but found that what she really wanted to know was, "Why do I need an e-learning strategy?"

Why Have an E-Learning Strategy?

As we talked, I realized that this manager was under the impression that her Learning Management System (LMS) *was* her e-learning strategy. Several years ago, Brandon Hall said that an "LMS is the lynch-pin of an e-learning strategy," but it technology alone is not a strategy. The reason why you need an e-learning strategy is to define the goals for your e-learning program and then logically explain how you will prove that the goals have been met. Your strategy will provide you with a foundation for a cohesive and cost effective eLearning program that can help you grow your eLearning offerings over the long haul. It provides you with a rationale, including the ROI, which will justify the budget and organizational changes you will likey need to be successful.

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Setting Goals for Your E-Learning Program

The first and foremost component of an e-learning strategy is a set of goals or objectives that need to be achieved with e-learning. There are several steps involved in generating a cohesive and comprehensive set of goals. The list of goals is generated using the following methods:

1. **Conduct a needs assessment** – A strategic needs assessment looks at the target audiences' characteristics and needs. For this step, you would use standard needs assessment processes and questions, but you will need to pay special attention to items that will make or break an e-learning program. These items include:
   - Attitudes about computer-based education
   - Motivation factors around getting trained
   - Hardware and software on typical computer platforms
   - Experience and comfort levels with computers and the Internet
   - Internet connectivity speed
   - Topics of interest in an eLearning format
2. **Review training team readiness** – The next step in determining your strategic goals is to determine your team's readiness to develop and deploy e-learning. In many cases, a lack of readiness may be the most difficult hurdle that you'll need to overcome. You'll need to assess your team's readiness both individually and collectively and I recommend doing this in a combination of one-on-one and team meetings. During these meetings:
   - Review e-learning solutions from suppliers, partners or competitors
   - Attend free Webinars from e-learning technology vendors
   - Pass out articles on e-learning that would be applicable in your environment
   - Discuss skills needed to deploy e-learning, including content expertise, instructional design, course authoring/development/programming, graphic design, technology administration and virtual instruction.

- Assess your team's interest in developing e-learning skills and making a shift in how training goals are accomplished. This process will tell you what skill gaps you will need to fill to have a successful program.

3. **Obtain management direction** – Management direction and buy-in for an e-learning strategy comes in two forms: top down and bottom up.
   - *Top Down* -- If your management team is asking you to establish an e-learning program, then schedule a discussion to talk about why they want this type of program what they want it to accomplish through it. Ask them if there is a program that they would like you to use as a model and what they like about it.
   - *Bottom Up* -- If your management team is unaware of what an e-learning program can do for them, then you will need to show them programs like the one you are proposing and discuss with them how this might fit in with the organization's strategic direction.

   Integrate management's comments into the goals for your e-learning program. During the meeting(s) with your management team, make sure that they have bought into the idea that your organization needs an e-learning program. Also ensure they understand that there will be some investment requirements, but that you believe that long-term the investments will pay-off.

Now, you're ready to draft the e-learning program's goals. Ultimately, the goals of your program need to demonstrate the value of your e-learning program to your organization. For example, goals may include statements about revenue generation, cost savings, customer retention or market penetration.

Elements of an E-Learning Strategy
Once you have a solid set of goals derived from all aspects of the organization, it's time to start formulating your e-learning strategy. The elements of an e-learning strategy are Technology, Content, Administration and Support, Communication, and Financial Analysis.

1. **Technology** – In general, there are two types of e-learning technologies used for delivering learning content; synchronous and asynchronous.
   - *Synchronous* technologies involve real-time interaction between the facilitator and the participants. Synchronous technologies are like a broadcast with a time and a "channel" (Web URL) for tuning in, and include Webcasts/Webinars and chats. They can be recorded for replay, and the recordings would be considered asynchronous.

- *Asynchronous* technologies are self-paced and involve having the learner control the time, place and even the content that they view. Asynchronous technologies include Web-Based/Computer-Based Training courses (WBT/CBT) and searchable databases such as, learning or knowledge portals, testing tools and help systems.
- *Collaborative* technologies are also commonly integrated into eLearning programs. These technologies allow participants not only to learn from the course or the instructor, but also to learn from each other. An online community of practice is an example of collaborative eLearning.
- *Blended Approaches* – Synchronous, asynchronous and collaborative technologies can be blended together to form blended e-learning solutions. Or e-learning can be blended with classroom instruction to form a blended learning solution.
- *Learning Management Systems (LMS)* -- Both asynchronous and synchronous learning programs can be managed by a learning management system. A Learning Management System is like an online registrar that registers learners for courses, tracks their progress, time in the course and test scores. Most LMSs focus on asynchronous eLearning, but a growing number are also integrating synchronous and collaborative tools into their systems.

To help you along with the educational decisions, I'd recommend making a matrix like the one below to help you with a directional decision. For each requirement, think about whether an asynchronous, synchronous and/or collaborative model would be the best solution. Remember that these models are not exclusive, but can be blended together to form a comprehensive e-learning program.

Requirement	Asynchronous	Synchronous	Collaborative
Learners need high levels of guidance		x	
Low learning motivation levels		x	
Audience values expertise of other professionals		x	x
Need for flexible training schedules	x		
Shift work, difficult to schedule training	x		
Limited computer experience		x	
Content involving interpersonal skills		x	

Your e-learning strategy should make a statement about the technologies that have been chosen to deliver the training, why those technologies were chosen and how the technologies will help to achieve your e-learning goals. Be sure to consider the eLearning industry standards, such as AICC, SCORM or the Experience API because utilizing them will allow you to change your Learning Management System, if necessary. Be sure to include the time and cost to implement the technologies. And you must balance the cost statements by

showing how the end results save money or generate revenue to cover the costs over a period of time.

To determine the technology component of your e-learning strategy is a complex decision involving educational as well as technological factors. Your IT Department should be involved in this process to help you through the technological decisions. If you plan to run your e-learning system internally, they may be the ones to run it and you want to make sure that you solicit their advice and get their buy-in on the tool that you choose. Over the years, I've seen IT department make and break e-learning programs. If you expect their participation and cooperation, be sure to make them your partner in the technology decision process.

2. **Content** –Content can come in many forms and from many different sources. In this section of the strategy, you need to define your content development and/or acquisition processes. This section of your strategy document needs to include:
   a. What content will you buy vs. build yourself?
   b. How you will prioritize and determine which e-learning courses get developed?
   c. Where are the sources of your content, such as Subject Matter Experts (SMEs), existing courses and/or printed publications?
   d. At a high level, what processes will you use to take each type of source material and develop it into an interactive course? Your technology decision will greatly influence the tools that your team uses to create courses. There may be several different processes depending upon the tools you choose, your audience's needs and existing source materials.
   e. Roles and responsibilities of the team members. For example, will the SMEs develop and narrate a set of PowerPoint slides? Or will you have an Instructional Designer work with a Flash programmer to develop an interactive simulation? Or will you have a virtual instructor modify classroom materials for delivery in a virtual classroom? Or will a Project Manager be assigned to breakdown and assign the tasks to appropriate team members and contractors? These are a few of the virtually unlimited options for course development. You may choose several methods or a combination of methods to achieve your timelines and quality standards.
   f. Your development processes should include methods for evaluating your success, including surveys and assessments. These evaluations should drive a feedback loop, so that you can continually improve your e-learning program.

3. **Administration and Support** – Stop for a moment and consider that you may now be running your training course simultaneously around the country or the world on many different computer configurations. When someone wants to take a course, they need to receive a userid and password. When someone can't get into a course, someone needs to help that person troubleshoot their access problem. When learners have questions about content, they need to feel that they receive adequate answers. Part of your e-learning strategy is to determine how you will assign, track, manage, support and

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report on your training course usage.   This part of the strategy may include the following types of requirements:

- *A Learning System Administrator* – this person has strong administrative skills and solid computer skills. He or she may assign userids and passwords, load courses into the LMS, review learner progress and send reminder emails, and generate learning usage and progress reports.
- *E-Learning Technical Support Specialist* – this person has strong technology and problem-solving skills, understands the learning management system and the course development technologies. He or she may take calls and emails from learners and either answers them or sends them to appropriate subject matter experts. Sometimes your technology vendors will provide this support function as part of their contract, or they may act as second level support, picking-up the problems that your support specialist can't support. The bottom line is that technical support for your learners needs to be included in the discussions with potential technology vendors.

If you work in a smaller organization you may have one person performing all of these administration and support functions, as well as developing and delivering courses. Your strategy needs to make sure that these functions are assigned to existing or new personnel. Their workload and effectiveness needs to be monitored regularly to ensure that you continue to satisfy your learners.

4. **Communication** – Once you have your courses online, you will want many learners to take them. Guess what?? This doesn't happen simply because you decided to put the courses online. There are two factors that need to be considered in communicating your e-learning strategy to your learners.

- *Change management* – Taking education online, instead of in a classroom is a change for many people. And in general, most people don't like change. So you've got to have a strategy to *convert* your learners to online training. Your strategy needs to include a way for them to try e-learning, at little or no risk to themselves. It needs to include some personal interaction to encourage and educate them about how to be an online learner. And your strategy might include a benefit or promotion for their successful completion of a course.

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- *Marketing Communication* – You could have the best e-learning courses in the world and if no one knows about them or understands why they are the best, you won't succeed. So, you're e-learning strategy needs to include a way to get the word out to your potential learners that these courses are available and would be of benefit to them. I've seen this done a variety of ways, from roadshows to tabletop displays, and email blasts to colorful brochures. Your marketing department can be a great resource during this process.

5. **Financial Analysis** – The Return on Investment will be the most important factor in determining whether your e-learning program receives the investment it needs to succeed and grow. Your financial analysis should include:

- Costs for technology, authoring tools, course development, support and administration.
- Suggested course prices should be multiplied by expected purchases to provide revenue expectations on a quarterly basis.
- Then you will need to calculate how long it will take for you to break-even and the yearly return on investment after you've recovered your costs.

Your accounting department should be able to help you by telling you how expenses and revenues are amortized in your organization, and they can provide advice about how to calculate and explain your numbers.

The financial analysis combined with the evaluation process (see section 2f) should provide a method for you to use to evaluate whether the e-learning program is meeting its goals over the coming years.

A Final Word of Advice

The purpose of this article is to give you a framework, or outline for your e-learning strategy. As you write your strategy, I recommend that you further research decision factors for each strategy element or hire a professional e-learning consultant to guide you through these business critical decisions. If you decide to hire an eLearning consultant, make sure that person has the credentials and experience to provide you with broad-based, data-driven advice.

By ensuring that your strategy has all of these elements, you will be well on your way to implementing a successful, high quality and profitable e-learning program for your organization.

About the Author: Jennifer De Vries is the President and Chief Solution Architect for BlueStreak Learning. Jennifer has over 25 years of experience in managing e-learning programs for companies such as Joint Commission Resources, IBM, Motorola, Galileo International, and Thomson/NETg. She is most well-known for writing the groundbreaking research report for Bersin & Associates that coined the term *Rapid eLearning*. In 2010, Jennifer was named one of the top 20 most influential people in online learning by http://www.onlineuniversityrankings.org. Jennifer has earned the designation of Certified Performance Technologist from the International Society for Performance Improvement (www.certifiedpt.org) Her company, BlueStreak Learning (www.bluestreaklearning.com), focuses on helping non-profit and for-profit organizations successfully start and grow high-quality, market-focused and revenue-generating e-learning programs.