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Purpose

Engaging a vendor can be daunting. What information do you supply? What is the minimum a vendor needs to get started on a project?

The purpose of this document is to help communicate the requirements of a project to a vendor / developer when seeking development assistance or Learning Management System consulting.

Introduction

eLearning is considered any of the following, but not limited to:

- Simulations
- Emulations
- Demonstrations
- Videos
- Optional Materials to consider
- Train-the-Trainer (T3) Guides
- Training materials
- Handouts (supporting)
- Wikis (think Wikipedia)

eLearning can be delivered by any or all the following [platforms](#)-

- Intranet
- Document Management System
- Knowledge Base
- LMS (Learning Management System)
- Email
- Social Media (Youtube, Company agreed networks i.e. Yammer / Workplace)

Devices could include, but are not limited to-

- Desktop PC
- Laptop
- Mobile Devices
- Tablets

Considerations need to be given to-

- Screen size
- Internet connection speed
- Ease of access required (post learning)

Requirements

Gathering high level documents allows us to start thinking about the validity of the learning and how the learning experience will be designed and built.

Type of Work being undertaken (tick all that apply)

eLearning Module	Video Filming	Video Editing
Assessment Writing	Assessment Creating	Consulting

Name of Project

(this is what will be used to name the items. Eg. Acme Corp. Health & Safety)

Are there multiple items to be created within the project (if yes, please see over page)

Where will the content reside (this is where the audience will access and view the content)

Intranet	LMS	Document Management System
OtherPlease specify:		

Does access to the content need to be tracked?

(ie. Do you require reporting on who has viewed the content)

Please list the items that you will be providing to assist in development

(eg. Scripts, images, Documents, PowerPoint)

eLearning Checklist - Vendor / Requirements

What is the absolute deadline date that this content needs to be ready for go-live release

Please note: If filming video, a script (or detailed bullet points) must be provided prior to filming, to both the Digital Learning Producer and the person being filmed.

Little or no preparation can increase filming and editing time, and potentially delay the launch of the project.

Development will not proceed until a clear direction and understanding has been agreed between all parties, and a rigorous analysis of the requirements has been documented.

eLearning Needs Analysis – eLNA

The needs analysis phase of an eLearning project uncovers crucial information and determines the direction and success of the project.

An eLearning Needs Analysis will pinpoint exactly what you; the business needs, and identify key considerations.

To determine the ideal learning solution, it is important to understand learning styles, business skills and development needs, as well as your immediate technical infrastructure.

There are four basic objectives for conducting an eLearning needs assessment:

- Isolate specific business challenges, problems and opportunities for which eLearning is a potential solution.
- Identify risks associated with pursuing and not pursuing eLearning.
- Determine risk management strategies that can be implemented.
- Consider possible eLearning configurations that represent potential solutions.

Questionnaire to be completed by client (stakeholders, sponsors)

What business problems or challenges exist for which eLearning is a potential solution?

Also consider any unexploited business opportunities that may exist, that eLearning would help to take advantage of

What functional areas does each issue impact? *(This question determines the audience)*

Identify the negative impact each challenge or problem is having and/or how the different functional areas are being affected (or how an unexploited opportunity might provide a benefit).

Who or what functional area “owns” each issue?

(For example, who is assigned—or most likely to be assigned—to solve each problem or capitalise on an opportunity?)

Stakeholders, sponsors, Subject Matter Experts (SMEs)

Is the management/executive leadership team aware of and recognise each issue?

Has a timeframe been established for addressing each issue? Describe.

Has a budget been established for addressing each issue? Describe.

eLearning Checklist - Vendor / Requirements

Prioritise the issues in terms of importance. Which issues are “high priority” versus “medium” or “low?” Why? This ranking will help you determine which issues must be solved immediately, those that can wait for a period of time, and those that might not be worth addressing at all.

For each issue identified as a priority (i.e. “High” and “Medium”, or however you ranked them), describe in broad terms how an eLearning solution would alleviate organisational pain, save money or create gain.

Describe any eLearning solutions that currently exist (which may potentially be integrated with a larger solution, modified, expanded or fully replaced).

Who are the decision makers in terms of selecting, approving an eLearning solution. This is the group to whom you will have to “sell” your business case and give you access to the necessary resources (time, personnel, budget, etc.).

Who will be involved in implementing any proposed solutions?

For each eLearning solution you have identified as a priority, consider potential risks and obstacles to each.

Identify potential risk management strategies that could be employed to minimise the effects of the obstacles you listed in Question #14. Examples might include a phased approach to enterprise implementations, pilot programs followed up by end-user feedback or focusing on winning success with a very specific business need.

How will the success of your eLearning initiative be measured? Describe the results expected and what success will look like in your business after the eLearning initiative has been implemented.

Further comments

Introduction from ELT explaining importance and relevance of training

Please think about the benefits and relevance of training to the intended audience and how that can be communicated from an ELT member, as an introduction to the training.

A message from management or the CEO/MD can help position the learning experience as a vital resource to achieve company objectives.

Thank you filling out this questionnaire

The next step for us is to create the eLearning Design Document.

The eLearning development team will take the answers to your questions and complete the eLearning Design Document as a blueprint from which we will begin the development cycle.

The eLearning Design Document will then be reviewed by the stakeholders and all interested parties (TBD at the start of development) and signed off as a commencement of the development cycle.

eLearning Detailed Design Document

Purpose:

The design document details background information, expectations, deliverables and methods for producing the required eLearning solution.

Project Summary:

This project is being designed to meet a specific business need.

[Background]

[Business Need]

[Course Goal]

Audience Profile:

This project is being designed for a specific audience.

[Audience Analysis Summary]

[Context Analysis Summary]

[Content Analysis Summary]

Deliverables:

Upon completion of this project, the following deliverables will be available

[Deliverable 1 (title and description)]- [Location (delivery system, archiving)]

[Deliverable 2 (title and description)]- [Location (delivery system, archiving)]

[Deliverable 3 (title and description)]- [Location (delivery system, archiving)]

Evaluation Instruments:

We will measure

1. Learner Reactions by – [method]
2. Meeting Objectives by -[method]
3. Transfer of Training by -[method]
4. Return on Investment by -[method]

Resources Required:

In order to complete this project in the time allotted, additional resources are required.

[Tool, application, hardware]

[Human capital (programmer, expert, developer)]

[Predecessor (environment, system, project)]

[Outsourcing]

Maintenance:

Defines what will happen after delivery.

[Plan for managing change]

[Ownership Roles]

Timeline:

Include “drop-dead” date and interim dates related to milestones.

Issues / Risks:

[Potential risks and plan for risk mitigation]

Resources

The resources can include content, pictures, graphics, links that currently exist.

Resource gathering and analysis can help to determine content gaps and additional content to be developed

What will you provide?

- PPT
- Docs
- PDFs
- Process Maps
- Impact Assessments

Is the content already designed?

Is existing content a stand-alone course or part of a larger catalogue of learning?

The information we need to collect from you includes

- Objectives
- Captured data
- Completion only
- Understanding of key concepts (assessment)
- Output Format of content
- eLearning Module
 - Specialist skills
 - Maximum time frame
 - Extended planning
 - Stored on LMS
 - Detailed data captured
- PowerPoint
 - Easy to develop and maintain
 - Effective delivery through creative application
 - Store anywhere (intranet, LMS, Docushare)
 - Deliver as a PPS file type for maximum effectiveness
- PDF
 - Ideal for printing
 - Mobile delivery
 - Store anywhere (intranet, LMS, Docushare)

Development Cycle Checklist

Planning

- Stages
- Activity task and description
- Owner
- Due Date
- Status
 - Distribute project plan to stakeholders for sign in and buy off
- TECHNICAL Specifications with IT department
 - Future proofing. Flash?

Content gathering and content analysis

Gather existing content and analyse. Determine content gaps and additional content to be developed

Graphics, logos, colour schemes

Instructional design

- Instructional goals and performance objectives
- Instructional strategy
 - How Content will be transformed into eLearning
 - Game based, story based, scenarios, assessment / quizzes
- Detailed Design document is blueprint
 - Content
 - Look and feel
- Instructional design elements of the program

Storyboarding

- Design template
- Content and programming instructions
- Voice over
- Each page / slide of module
 - 3 steps
 - 1st Draft, distribute to stakeholders, review and approve
 - 2nd Draft, distribute to stakeholders, review and approve
 - Narration script (if applicable for voice over)

Development and Production

- 4 steps
 1. GUI
 2. Graphics, photos, animations, characters
 3. Create assets and get approval
 4. Produce, develop, and program

Quality Assurance

- Testing
- Alpha
 - Testers to test
 - Test document
 - Review, changes
- Beta
- Stakeholders to test

Integration & Deliver

Evaluating and Reviewing

Evaluating and reviewing of content is typically done at the end of each of the following stages within the development cycle

1. Planning
2. Content gathering and content analysis
3. Instructional design
4. Storyboarding
5. Development and Production
6. Quality Assurance
7. Integration & Deliver

Learning Management Systems

There are numerous stages of an LMS implementation and these stages can vary depending on the specific requirements. In order to fully understand these requirements the first stage is to consult with the client to understand their current position and the position they want to be in.

When going through the consult phase, there are a number of questions we would ask to further our understanding;

- Is the LMS to be installed onsite or is the LMS cloud based being hosted either by the LMS vendor or on the company's own cloud servers?
- How many users will be registered with the LMS?
- How often will content be released?
- What is an expected concurrent user load on the LMS? i.e how many users could access the LMS at the same time?
- Are the users internal employees working for a single organisation, members of the public, or both?
- Are users remote and is there an expectation that they access the learning via a mobile device?
 - *(careful with this, as there may be a company desire, but employees may not want to use their personal phone to access work related learning)*
- Are learners using their own devices to access the LMS or using company issued devices?
- Who is designing and building the content that is being delivered via the LMS?
 - *If the LMS is to be mobile, it means the learning content needs to be mobile as well.*
- If the LMS is expected to be mobile, will users be expected to download an app (LMS) to their phone?
- Does the LMS need to report on CPD activity?
- What's the budget for implementing and ongoing costs (annual)?
 - *Looking for a "cheap" LMS may not equate to cheap in the long term*
- Which department is managing the LMS implementation?
- Is there a change management program happening as a result of the implementation?
- What reporting is required from the LMS?
- Who will manage the LMS ongoing (internal or outsource)?
- Is training on LMS admin and end user required?
- Will video be delivered via the LMS?
- Does the organisation require social learning capabilities such as forums and discussions?
- What thought has been given to the hierarchy, roles, administrators and group levels?
 - *This can sometimes result in large mapping exercises to ensure the right people have the right level of access.*

Further questions may be fleshed out depending on the answers provided, and thus an extension to the consultation process is required.