9 STEPS TO BETTER E-LEARNING PROJECT MANAGEMENT
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As an e-learning professional, you’re probably used to wearing a lot of hats. Writer, editor, designer, educator … the list goes on. But one of the most important roles you’ll play in any e-learning project is project manager. You can have a fantastic idea, design it to perfection, and even line up some awesome tools to build your course. But the success of any e-learning project often hinges on how it’s planned and managed.

E-learning guru Tom Kuhlmann puts it this way: “The success of your e-learning course starts and ends with project management.” These words ring true for most e-learning professionals. While creating valuable content and designing a great e-learning experience are key to a successful online course, there’s a lot more to consider when building that course. From creating a plan with your client to measuring your course’s success, every project has several different pieces that need to be put together—much like a puzzle.

The good news is you can effectively manage your e-learning projects if you follow this simple 9-step plan. So let’s get started and find out how to make managing your next e-learning project a whole lot easier.
Step 1: Set Expectations

Picture this: You work day and night to create a beautiful, effective, and engaging course. You practically skip to your client’s office to show off your incredible accomplishment, positive that you’ve built a real winner. But your client scrunches her face in dismay and delivers these bubble-popping words: “This isn’t what I wanted.”

Horrible scenario, right? Fortunately, there’s an easy way to avoid it. Before you begin building an e-learning course, sit down with your client and any other project stakeholders to get a solid idea of what they want and what success looks like to them. The more clearly you
set expectations and goals up front, the less time you will waste later clarifying—or worse, arguing about—what was really supposed to be done.

Get a grip on the goals

To really get a handle on what your client’s trying to accomplish, you’ll want to understand their business, performance, and training goals. The more information you can get up front, the better equipped you’ll be to deliver something they’ll love.

Start with the business goals. These will give you the big-picture view of what they’re trying to accomplish. For instance, they might want to create a sales training course that’ll boost sales for a product line. Once you get this nugget of information, you can plan a course that focuses on increasing sales.
Next, ask them about their performance goals to get a more accurate picture of what needs to happen to meet those business goals. In the sales course scenario, you’d dig a little deeper and see that to boost sales, the company’s salespeople need to respond quickly and persistently to leads. Now you can brainstorm ways to do this.

Once you’ve got a handle on the performance goals, it’s time to define your training goals. These outline what your training needs to accomplish. For example, if salespeople need to respond more quickly to leads, one of your training goals might be to teach them how to use the company’s customer relationship management tool more effectively.

If you’re getting stuck on goals, or just want more guidance on helping clients align their courses with their goals, check out this *Performance Consulting (2008)* book. You’ll find great tips on how to gather and use information from your clients.
Make sure an online course is the best solution

Now that you understand their goals, take a little extra time to find out if e-learning is the best solution to meet these goals. You don’t want to waste your time (or your client’s time) if e-learning won’t deliver good results. Here are some questions to ask your client:

• What problem are you trying to solve?
• What makes you think this is a problem?
• Why do you think online training will address the issues?
• What do you expect as an outcome of this course?
• What types of change in performance would you like to see learners demonstrate?
Asking these questions helps you focus on the results your clients want, rather than creating the solutions (namely online courses) they think they need. By looking at the big-picture view of your client’s situation and accounting for the benefits and limitations of training, you’ll help your client identify the best solution for their needs. Sometimes it’s online training and sometimes it’s not.

If you assess your client’s needs and there are better alternatives than an e-learning course, be honest with them. An unnecessary e-learning project will likely result in an unhappy customer, which is never a good outcome. By being upfront and honest, you’ll free up your resources to work on projects that bring real value. And your clients will have a better idea of what they need to achieve their goals.
Step 2: Pick the Right Type of Course

Once you’re confident that online training is indeed the best solution, it’s time to pick the type of course that will work best. If you’re creating compliance training for accountants, an information-based course will probably be your best bet. But if your course teaches learners how to counsel troubled teens, you’ll be better off with a performance-based course that focuses on changing behaviors.

Again, your client’s goals are important because they’ll dictate which type of course you’ll develop.

If you need to deliver information, but don’t need learners to change their behaviors, you can build an information-based course. For example, you could highlight new benefits added to an employee health
plan without requiring learners to do anything, such as prove that they’ve absorbed the information.

If you need to teach learners how to do something—and make sure they’ve learned it—then you’ll want to build a course that gives step-by-step instructions with specific outcomes. This type of course focuses on procedures and processes. It usually includes repeatable tasks that mimic what learners will do on the job. For example, you might show learners how to complete an Excel worksheet or create a PowerPoint template. And then ask them to do it on their own.

If you need to teach principles or guidelines that learners will need to apply—in essence changing their behavior—then you’ll want to build a course that helps learners solve problems.

These types of courses are the most challenging courses to design because you have to create realistic situations to help learners understand these principles. To teach someone a new behavior, try building a relevant case study or scenario and letting her practice what she needs to know.

All three types of courses can be as simple or complex in design as you want to make them. Once you pick one, consider how complex you want (or need) it to be. Just keep in mind that you’ll need to budget more time into your project schedule for more complex courses.
Before you think about the story for your course or start experimenting with its design, have a heart-to-heart with your client and anyone else who has a say in the project’s success to find out what metrics they want to move. By now, you should already have a good understanding of your project’s goals. Now you want to assign metrics to those goals. Here are a few tips to make this exercise effective and painless.
Align your course outcome to a measurable metric

Here’s where your performance goals come in handy. As you go through them, you’ll probably find that some of them are vague and hard to measure. A perennial favorite is “improve the department’s effectiveness.” Now’s the time to identify something more specific. For instance, ask yourself, and your client, what makes a department effective? Is it more sales? Fewer bug reports? More closed support cases?

Look for outcomes of improved performance—maybe it’s 15 percent more machines built per day, or a 25 percent decrease in errors, or shaving 30 percent off of production time. Keep in mind, though, that external events beyond your control—such as a natural disaster or a resource shortage—can influence the outcome you’re measuring. So be sure to identify a few different metrics to support your main one and avoid misleading results.

Put a little meaning in your metrics

Frame your metric with meaningful context so clients can see how your course moved the needle. Simply saying you saved 55 minutes will inspire the question “Who cares?” No one will understand why that amount is significant. But if you put it in comparative terms, such as “we doubled production” or “we cut errors by 35 percent,” you’ll clearly show how your course made a difference.
Keep your own metrics in your back pocket

Some clients can’t or won’t provide performance-related data back to you. In that case, you can show them a metric that’s in your control: your costs. If you know a typical e-learning course of a certain scope and complexity takes X hours to build and typically costs Y dollars, use that as your benchmark and aim to come in under that. You’ll show that you’re respectful of your client’s budget—and that consideration speaks volumes.

At the end of the day, there are many different metrics to measure the success of your e-learning project. To narrow down the possibilities, let’s look at the type of course you’re building to see which metrics will best show proof of success.

1. Performance-based courses

Your best bet is to align the metrics with your client’s business goals, such as improved productivity, fewer errors or incidents, lower operating costs, or increased revenue.

For example, if your course teaches employees how to resolve their IT issues on their own, then measure a drop in call frequency or IT help requests.
2. Information-based courses

Compare e-learning to other alternatives to show time and cost savings or how many people have viewed the course.

For example, if your online course replaces a traditional classroom course, show how much money the company’s saving on staff, travel, and physical space. Or, if you created a compliance course, show how much money the company avoided spending on penalties. Get creative—you can find numerous metrics for just about any type of course.

Once you have a good idea of how you’ll measure success, send your client a document with your success metrics plan. That way, everyone will have a common understanding of what constitutes success. Also, by sending the metrics plan ahead of time, you give your client a chance to weigh in. If she doesn’t agree with the metrics you’re using to define success, you’ll need to have a longer chat about project objectives. Always make sure you’re on the same page before you start building your course.
Step 4: Create a Service Level Agreement

Ok, so you know the project’s necessary and you have a clear understanding of the goals. Now it’s time to agree on what needs to be done and when it needs to be done. You’ll use this agreement as your guide for the rest of the project, so make it as clear as possible.

To get started, set up some time to go over expectations, timelines, and deliverables with your client, and then capture them in a simple, easy-to-understand agreement. Many people call this a service level agreement (SLA) and it’s an easy way to minimize extra work, wasted resources, and frustrations. It’s something your client will appreciate, but it’s as much for your own benefit as it is for theirs.
So what’s in the SLA?

Simply stated, your SLA sets expectations and defines success. But it’s also a contract that clearly outlines what you will and won’t do with the project. To confirm you’ve got everything covered, be sure to include all of these things:

• Project scope  
• Desired outcomes  
• Key stakeholders and what they’ll do (review, approve, etc.)  
• Milestones and timelines  
• Deadlines

Here are a few guidelines to keep your SLA on track, as you define the scope of the project:

• **Be detailed but brief.** Keep it simple and direct to avoid confusion.  
• **Use clear, simple language.** Leave out any technical jargon or acronyms.  
• **Watch for scope creep.** If you see this happen as the project progresses, nip it in the bud. Your SLA outlines what will be done and when, so stick to the plan.  
• **Detail what’s to be done.** And always include what’s NOT to be done.
Step 5: Get the Right People on Board

To build your learning masterpiece, you’ll likely need the cooperation and input of others. So before you begin, make sure you have access to the right folks for the job. You can figure out who these people might be by asking yourself—and your client—these types of questions:

- Who’s the final authority for the project?
- Who should review the content?
- Who can provide assets like logos, images, and documentation?
- How will you connect with the potential learners?
- Who will review or pilot the course?
- How will you implement the project?
- What type of IT support or technology do you need?
Once you’ve identified who needs to be part of the project team, pull them into the process as early as possible. You can start by providing an overview of the project and outline where you need help from each person. This helps define roles and expectations, which can be a great resource if your project hits roadblocks.

When you put your team together, consider how team member availability can impact the project. For example, if subject matter experts (SMEs) and external resources don’t have bandwidth to help you, your project could face frequent delays. So be sure to consider availability when you put together your project dream team.

Let’s take a look at some of the roles you may have on your team. Keep in mind, one person may have several roles. For example, you might be the instructional designer, e-learning developer, and the project manager.

**Client**

Make sure you know who your client really is: the person who has the final say on the project. You don’t want to finish designing your course only to find out that it needs to go through a final review by someone who hasn’t been involved in the project or provided any guidance or feedback.
Subject Matter Experts

SMEs provide guidance, expertise, and context for much of your course’s content. Typically, they’re also responsible for signing off on the accuracy and completeness of course content. And as they’re often busy, you’ll want to make sure you consult them on project schedules and keep lines of communication open.

Learners

If you want to know whether your course hits the mark, get a few of your learners involved with pilot testing. They can provide valuable feedback on content and help you make sure that everything in the course works as planned.

Project Manager

If you’re reading this book, then that’s probably you! As project manager, you’re responsible for keeping project activities on track and making sure the project meets specified goals.

Instructional Designer

Instructional designers identify the gap between the current situation and the desired one, and then design learning experiences to close that gap. They work closely with project managers, SMEs, and e-learning developers (and are sometimes one and the same) to develop courses.
IT / LMS / Technical Support

Without your IT team, you likely won’t be able to deliver courses to learners. IT will take care of content hosting, integrating the course with a learning management system (LMS), and troubleshooting technical hardware and software issues. To avoid unpleasant surprises, engage IT as early as possible.

E-learning Developers

These are your course builders. They translate the design of the instructional designers into a course, integrating audio, video, graphics, interactions, narration, and more to bring the instructional designer’s vision to life. And in many cases, the e-learning developer may also be the instructional designer.

Multimedia Developers

Sometimes you’ll have access to multimedia experts who can produce really pro audio, video, and graphics for your course. If you have access to these resources, use them. Strong visuals can help activate a learner’s imagination, keeping them engaged and receptive to course content.
Step 6: Build an Actionable Project Plan

No matter how well you plan a project, you’ll undoubtedly face some hurdles, delays, and changes. And when you do, don’t panic. Just remember one simple piece of advice: Keep moving forward.

To make sure you’re equipped to keep your project moving forward, you’ll need an actionable project plan that answers three key questions:

- **What** work will be done?
- **Who** will do it?
- **When** will it be done?
Talk to your project team to pull your project plan together. They’ll help you define timelines, resources, and success criteria. Here are four basic steps to help drive your conversations with them:

1. **Identify what needs to be done.** This will set the stage for everything else.

2. **Identify your resources and make sure they’re available.** Be sure to account for external resources such as contractors and equipment, which are a common cause of delays.

3. **Assign responsibility to your team members.** Make it easy for everyone to clearly understand who’s responsible for what.

4. **Ask task owners to estimate how long each task will take.** You’ll be able to build more accurate timelines when you solicit input from the people actually doing the work.

The level of detail you include in your project plan will vary based on the size of your project. Here are some details you’ll want to consider:

- Supporting documents, such as needs analysis, storyboards, and narration scripts
- Project plan and schedule
- Draft versions of the course for review
• Completed, published e-learning course, including job aids and source assets used to build the course
• Post-project evaluation

Tips for creating a good project plan

Here are a few tips to help you create a plan that works:

1. Start with the results and move backwards. Visualize your final deliverable and then work backwards to identify everything that’s needed to get there. Once you have an idea of all the interim deliverables that are required along the way, you can assign actionable steps for each of them.

2. Define specific action items. If you know exactly what you need to do, it’s easier to do. So when you’re creating action items, use verbs. Verbs will help you see what exact action is needed.

3. Chunk your work. It’s a good idea to break the work down into manageable chunks that can be completed regularly to give the team a sense that the project’s on track. If everyone’s on the same page, you won’t have people confused about who’s doing what or risk action items getting lost in the shuffle.

4. Determine check-in points. Check in with the team regularly to make sure things are moving forward. You can do this by phone, via email, or in person, depending on the project you’re working on, your team’s
location, and the type of project. For most projects, a 15-minute project review (via phone or Skype) a couple of times a week is a great way to catch up with your team and keep everyone on track.

Remember, a good project plan clearly communicates what work will be done, who will do it, when they will do it, and how the project will be managed. Once you establish this clarity and agreement among the team, you’re on the right track to a successful e-learning project.
Step 7: Communicate, Communicate, Communicate

Even if you’re working with your team every day, exchanging emails, discussing issues as a group, and meeting regularly, you run the risk of losing important emails and messages in a sea of data if you don’t have a standard process for communication.

You’ll find plenty of applications to help you communicate and collaborate like a pro. Here are some easy-to-use collaborative tools you might consider adding to your project management toolbox.

Basecamp: Lets your whole team share files, meet deadlines, assign tasks, and share feedback.
Huddle: Gives you a network of secure online workspaces where you can store and share files, collaborate on documents, and manage tasks.

Trello: Organizes your projects into boards. You can easily see what’s being worked on, who’s working on what, and what still needs to be done.

Asana: Puts tasks and conversations together so your team doesn’t have to rely on email.
Step 8: Roll Out Your Course

You did it! You built a course that you, your client, and your project team love. It’s time to pat yourself on the back and call it a day, right? Almost! Before you celebrate, you need to deliver your course to learners. And that means it’s time to think through your rollout and implementation plan.

It’s best to start by doing a little prep work. Here are a few things that need to happen before you roll out your course:

1. Test your course

You may have lived and breathed your course for months, but your learners haven’t, and you need to see how they’ll fare. Find a few sample learners that fit your audience’s profile, and ask them to complete the course from start to finish.
Here are a few questions to ask them:

- Are the instructions and navigation clear?
- Is the course realistic?
- Does the course meet the learning objectives?

Give your testers a way to provide feedback—such as a written form or online document—and ask them to note places where they are confused by the instructions or unsure where to click. This new set of eyes will give insights that you’re often too close to observe. Once you gather their feedback, adjust your course as necessary.

2. Upload your course

When it’s time to get your course online, the first thing you’ll need to do is to upload your published course files to a web server. Unless yours is the organization’s first e-learning project, there’s probably a server already designated to host online courses. Check with your IT support resource to find out exactly how you can upload your course.

If you’re working with a large organization, you might have more than one option for hosting the course. In this case, think about whether or not you want to track course activity. If you need to track anything beyond a simple completion status or anonymous usage data, an LMS is your best option for tracking your e-learning course activity.
When an LMS is involved, be sure to work with the LMS administrator to confirm that you’re publishing the course in the proper format (SCORM, AICC, or Tin Can) and that you upload it to the right place.

3. **Perform a technical check**

Even the best course is at risk if it doesn’t work for your audience when and where they need it. That’s why it’s important to confirm that it works (without problems) on a range of possible hardware and software configurations and that it doesn’t interfere with any other existing applications. You can do this by pilot or beta testing the course with a small number of people from your target audience.

If you’ve built in some interactions, always test the final course to see how these elements look and function in the published output. Navigate the course every way possible to experience every single scenario your learners could encounter. Try each of your drag-and-drop activities, click-and-reveal tabs interactions, animations, and links to make sure they work.

4. **Spread the word about your course**

After your course is up and running without any issues, it’s time to contact your audience and tell them all about the course. A good communication plan can help you with this.
When drafting your course description and communications, consider the following:

• How will learners know that the course is available?
• Why should learners take your course?
• How are managers able to tell if their staff needs to take the training or not?
• How will learners access the course? Do they just need a link? If so, include that in your message.
• Are they required to log in to an LMS to view it?
• Do they have the information they need to log in?

Once you’ve answered these questions, clearly and completely communicate all the details in an email, newsletter, or other communication vehicle used by your company. Not only will this let learners know that your course is available, it’ll also minimize the amount of time and money spent answering questions and supporting the course.
Step 9: Measure Your Course’s Success

When you created your SLA, you set some project goals and attached success metrics to them. Now’s the time to reflect on them and see how the actual project results measure up. Did the project meet its goals? Was the project completed on time and within budget? Is your client satisfied?

It’s important that the courses you build are successful and bring value. Take some time to meet with your client to compare the SLA with the results. You’ll want them to sign off on the agreement that the project was completed and that they’re happy with it. And if they’re not, you can learn why—and what you can do to fix the issue.
Your debrief agenda should include data that shows results, such as learner feedback, observations on whether the training impacted on-the-job performance, and scores from in-course learning assessments. Revisit the metrics you identified earlier and see what learners and stakeholders say about the course’s effectiveness.

You might also have a list of lessons learned from the project launch. For example, did the scope of the project change in the middle of the project? Did this cause project timelines to derail? If so, make sure your client is aware of any unexpected outcomes—good or bad. And it’s always a good idea to look for opportunities to turn mistakes and snags into improvements for your next project!

By properly closing out the project, you’ll rest easy knowing that your team has met its objectives, satisfied the client, and learned important lessons along the way. With a successful project under your belt, you can move on to your next one with confidence.
Go Forth and Project Manage!

You can’t expect every project to be smooth sailing, but this 9-step approach should help you to steer a successful course. And with clear steps to guide you to success, hopefully you feel ready to tackle any e-learning project that comes your way.

Bumps will happen, projects will change, issues will come at you left and right, and you’ll face challenges you never imagined. But the best part of project management is that it prepares you to handle the unexpected.

And if you get stuck, visit E-Learning Heroes often. You’ll find great articles, discussions, downloads, and other resources to help you navigate every step of your project. You can also connect with other e-learning professionals to see how they overcome the challenges that come their way.
If you enjoyed this guide, please feel free to link to it from your own site or share this link on social networks.