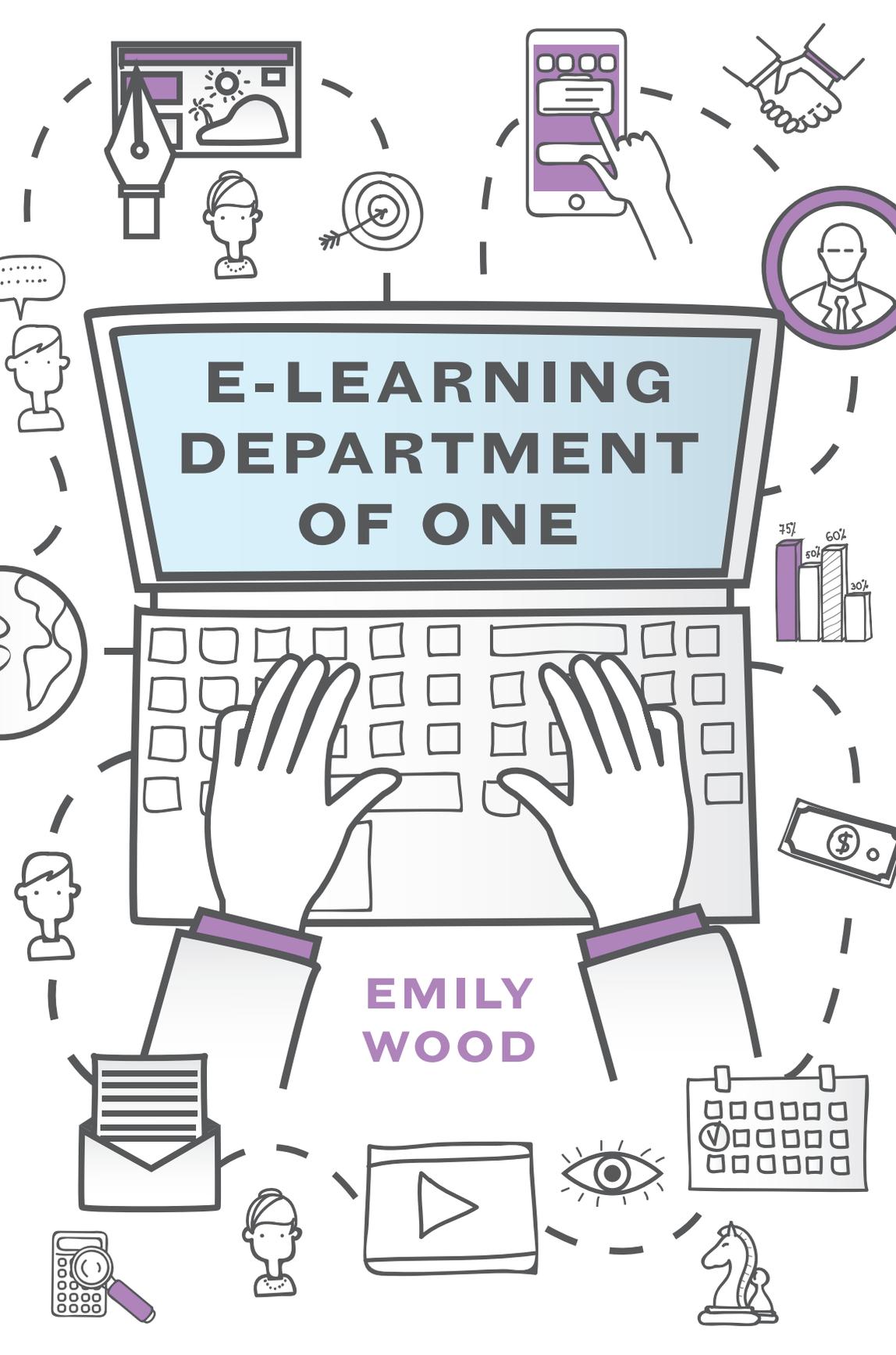


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To Jonathan for inspiring me.
To Brian for keeping me sane.
To Christopher for pushing me.

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Foreword

I met Emily because she shares my commitment to lifelong learning and development.

Within just a few months of connecting with her, I knew that she was the real deal. With more than 14 years of experience in training and instructional design, she has executed in-person and online training programs for the federal government, nonprofits, and the corporate sector. Market research, management, scrum, social media, training: There's nothing Emily can't do.

This is why when she asked me to write the foreword for this book, I immediately said yes. I knew exactly why she wrote it and why she'd asked me, the founder of the eLearning Industry network, to offer my insight into this topic.

More professionals are choosing to go it alone in the e-learning marketplace. It's not easy to be a department of one in any area, let alone online learning, where the instructional designer, e-learning developer, graphic designer, multimedia expert, client service coordinator, editor, course tester, and project manager are the same person.

Being a soloist comes with a lot of responsibilities and requires a lot of creativity and flexibility, an independent mind, and great organizational skills. I know a few individuals who fit this description and they produce outstanding work, even though it seems to outsiders as if the work just magically gets done. That's not the case. These professionals are truly

exceptional in preparing, organizing, planning, implementing, tracking, budgeting and, more often than not, thinking out of the box.

The good news is, these skills are ones you can learn. And that's where this book comes in. It's filled with incredibly valuable information and resources for those who are about to expand their horizons and take on multiple e-learning roles.

As you can probably guess, the tips and best practices written here work. Otherwise I wouldn't be endorsing Emily as strongly as I am.

The best thing about this book is that it's written in a way that shows respect for your time. The author knows your time is valuable, so she's presented the information in such a way that you can jump to the chapter that interests you, if you know your gaps and want to focus on a specific area. On the other hand, if you're new to e-learning and don't know where to start, the chapter order will walk you through the process.

Chapter 1 focuses on organizational needs assessment. If you join an organization for the first time or move into a training and development role, then this chapter will be extremely valuable to you, helping you get to know your company and the people and processes it encompasses. How are you going to get information about the staff for whom you will be designing e-learning? What questions do you need to ask to learn more about the technology you'll be using? How are you going to choose the right project management style? Will you have the opportunity to review the work created or purchased before you started? What about the evaluation data you have access to?

After you're done with your company's needs assessment, it's time to assess organizational and individual employee needs for specific training modules, which brings us to chapter 2. Here you'll learn how to determine needs and gaps and build the solution to move learners to the desired state. Knowing the organization, learners, and expectations for training will allow you to establish what qualifies as success and ensure

that all stakeholders (including subject matter experts and whoever will approve the final deliverable) understand the timeline.

This is, of course, impossible without good project management, about which you'll learn in chapter 3. If you despise wasting time with bureaucracy, the tips provided here will help you not only ensure you deliver usable content in a timely manner, but also estimate the amount of time you spend on each project for assessing costs and ROI (not to mention transitioning between projects when you need a mental break).

Chapter 4 is all about your favorite frenemy, subject matter experts, or SMEs—unless, of course, you're the subject matter expert in your project! Although SMEs are invaluable to the content development process, they're often either unavailable or unable to understand how long it will take you to code the training content into the module. In this chapter, you'll learn how to cultivate a positive, trusting working relationship with your SME and be more creative in your development.

In chapter 5, you'll learn how to identify the right learning approach by taking into consideration the stakeholders for the module being created and the availability of the content, as well as how to collaborate with others, design a curriculum for your learning solution, determine its length, select technology, and create emotional connections to your content.

In chapter 6, you'll find out why creating a storyboard is critical—regardless of the project management approach you take—and how it will save you development time in the long run.

Chapters 7 to 10 are all about specific activities, techniques, and tools for creating engaging material. From branching scenarios to simulations, games, interactions, and feedback; from choosing the right authoring tool to selecting the right learning management system; from appropriate uses of audio to creating video and graphics in e-learning—in these four chapters, you'll find some of the best e-learning development tips you've read in a long, long time.

And what about accessibility? Even if you don't need to make your content accessible, is it worth ensuring that your future learners will be able to take your course if they need accessibility features? It certainly is. In chapter 11, you'll find some great hacks for accessibility development and making sure that your content is accessible to all.

Chapter 12 focuses on testing. It contains everything you need to know about alpha testing with SMEs, beta testing quality control, and getting feedback from alpha and beta tests to ensure a smooth implementation.

Now that the module is published and the learners are taking it, you can begin the assessment and evaluation process outlined in chapter 13. From knowing the difference between assessing and evaluating to avoiding analysis paralysis and evaluating yourself, in this chapter you'll discover how to determine whether you met your, and others', expectations for your project.

Finally, chapter 14 is a great gift for those who want to further their professional development by building on self-evaluation and continuous growth. Tools, software titles, conferences, and other resources are here to keep you motivated, especially when you're not feeling inspired.

My favorite part? The "Embracing the Reality" and "Advice From the Trenches" sidebars throughout the book. In every "Embracing the Reality" story, you'll read about another learning professional who worked in a department of one and made it happen. Similarly, in "Advice From the Trenches," you'll get the greatest tips and tricks from accomplished training professionals to make the most of working on your own. They're fantastic.

E-learning Department of One inspired me, taught me things, and made me think. If you're hungry to be the best version of yourself, grab a copy!

Christopher Pappas
Founder, eLearning Industry Network
December 2018

Introduction

Don't worry—you're not alone. Well, technically, if you picked up this book, you probably identify as an “e-learning department of one,” but you aren't the only person in this situation. There are lots of us out here.

Join me in co-opting the introvert's motto: [We] Unite Separately [to Develop E-Learning].

How Did I Get Here?

From the experienced instructional designer at an organization that is just starting out with e-learning, to the experienced marketer who needs to develop an e-learning module for sales support, to a subject matter expert sharing content with a larger audience, to a classroom teacher taking subjects online, we are all at various stages of our knowledge of e-learning and training development. However, what we have in common is that we are the rare entrepreneurs who find ourselves in the position of developing it on our own.

We can see the departments-of-one trend in the proliferation of mobile devices and the increased value of just-in-time training. What could be better than having your employee access the information on how you want them to work at the exact time they're doing it on a device they already own? What better way is there for an employee to spend five minutes of time between clients than learning about a new initiative, upskilling, or refreshing knowledge from a training course they took last week?

Small organizations might hire you as a freelance or 1099 contractor, while medium-sized organizations might offer you full-time employee status. Hiring you is probably a test as to whether e-learning is feasible for the organization. With a small company, this could lead you to years of work as a freelancer or eventually being hired in-house, if that's what you'd like. For a medium or larger organization, it may lead to the development of a department.

Hopefully you're happy to have found yourself in the job that you have now. You're building the best training that you can with the time and materials that you can access. But, you might be starting to see gaps. You have found websites that show off the latest and greatest e-learning and you want to build those things, but don't know how to get there. Or, you have all the skills to do the work that you want to do, but aren't sure where to start with the giant pile of projects sitting in front of you.

I wrote this book because I found that I was acting as an instructional designer, project manager, and e-learning developer for a midsized company and wanted resources but wasn't able to find them. This book is an amalgamation of the things that I've learned and tips and tricks for development that you can now take advantage of in your e-learning development as a department of one.

How Do I Use This Book?

This book does not need to be read in the order the chapters appear. If you know where your gaps are and you want to focus on specific areas, jump directly to that. Your time is valuable! If you're new to your situation and you want to figure out where to start, these chapters are ordered in a way that will walk you through the process of developing a project and delivering it to your client.

Let's start with some assumptions:

You are a lifelong learner and you want to better yourself. This book will be a starting point for you to assess your strengths and weaknesses to build better modules.

You have expertise in one or more of the following:

- **Instructional design.** You're a teacher or an instructional designer who already knows how to develop effective training. You understand SMART goals and learning objectives. You know your audience and how to build activities that will help them understand the content. You know how to evaluate the effectiveness of training.
- **Multimedia or e-learning development.** You know the insides and outsides of a computer and have a few software titles that you use to create training that other people have written. You know your way around a microphone, a video camera, and editing software. You know how to learn more about the software titles you are using or will use to increase your proficiency.
- **Content expertise.** You've got a PhD in astrophysics and you want to show the world how the universe is expanding. You know how to do a backflip and can teach other people to do it too.

You're passionate about your content and want to put it out there.

You're doing this alone. You did pick up a book with *Department of One* in the title, after all. You have limited financial, time, and knowledge resources at your disposal to get your content out into the world.

You are developing e-learning, or something that is viewed or taken on a computer or mobile device with an Internet connection or with the ability to download materials for later access without Internet.

You know something about the audience for your content. You'll reach them by seeing them in class, working with them, selling a product to

them. Maybe you're putting content on YouTube just to share your knowledge with the world to make it a better place. You have in mind the language of your learner, their level of background knowledge on the subject you're teaching, their age, the technology they'll use to access your training, and the speed of their Internet. If you don't know all of this, no worries—I'll discuss how to find the answers in chapter 1.

What's in This Book

Here is a takeaway from each chapter to give you an idea of an immediately usable idea or suggestion:

- **Chapter 1: Organizational Needs Assessment.** Whether you're a new hire brought on to design e-learning or an instructional designer asked to take it on, conduct an organizational needs assessment before you start on any projects. This will provide the preliminary information that can inform the development of all content and the overall goals for e-learning.
- **Chapter 2: Module-Specific Needs Assessment.** Each time a new module is developed, an e-learning needs assessment should be completed. Even in cases where you can reuse information from other modules, this step should not be skipped entirely.
- **Chapter 3: Project Management.** Project management is worth the time to ensure that you deliver usable content in a timely manner. It will minimize time wasted with bureaucracy by making your work transparent.
- **Chapter 4: Working With SMEs.** A positive, trusting working relationship with your subject matter expert, or SME, will allow you to be more creative in your development.
- **Chapter 5: Content Development.** There's more to "developing" content than writing it yourself. Curate from other sources, both within your organization and from outside.

- **Chapter 6: Storyboarding.** Spending time on this step will save you development time in the long run. One storyboard does not meet all needs. Customize for the instruction.
- **Chapter 7: Building Activities.** The best activities are the ones that allow learners to fail fast and often and get the feedback and scaffolding to be successful when confronted with the same situation in real life.
- **Chapter 8: E-Learning Authoring and Development Tools.** There are some great, free tools that you can start using today to create e-learning. No one paid tool is better than others; there are trade-offs in support, usability, and cost.
- **Chapter 9: Audio.** If you decide to use audio, whether that's a voice-over, music, or both, think about accessibility, education level, and content difficulty when choosing what can be offered as audio in your module.
- **Chapter 10: Graphics and Video.** If you want to save time when recording video, build a storyboard, write a script, and stick to it. Consider the benefits and drawbacks of purchasing graphics and video versus developing them yourself.
- **Chapter 11: Accessibility.** A growing body of legislation on accessibility for anything found online has made it easier to develop to meet a variety of needs.
- **Chapter 12: Testing and Sharing.** Having an LMS can make sharing content easier, but it isn't the only or best way for you to reach your audience.
- **Chapter 13: Assessment and Evaluation.** With xAPI, the assessment of whether an employee is able to perform the tasks taught in the module can be observed on the job and tracked.
- **Chapter 14: Resources and Professional Development.** Connecting with other e-learning departments of one will give you

the chance to give and receive advice and keep you motivated in your development, especially when you're not feeling inspired.

Each chapter features two kinds of sidebars. The first was inspired by a recent conference I attended. There, a participant demonstrated a project she'd created. When an audience member asked about a particular piece of functionality, she responded by saying that because she worked alone and had tight deadlines for publication, she'd learned to "embrace the sh*tteness" of the work she was doing. She made things that worked but with an added bit of humor—she referred to it as "quirky."

I agree with the idea of knowing what we can do with our available resources, but prefer a more positive spin. The stories from the people doing this work and making it happen are in sidebars called "Embracing the Reality." Some of these stories are positive, and describe projects that worked out well. Others demonstrate that being a limited resource, sometimes you have to walk away because you don't have the ability to resolve every single issue. These sidebars are intended to give you a window into the work that other professionals contend with in similar situations.

Tips to make the most of working on your own are in a sidebar called "Advice From the Trenches." In these callouts, you'll find workarounds and specific advice on how to improve your skills and knowledge in an area.

Note that for both sidebars, stories with no name attached are my own.

In each chapter, I'll provide examples to show how different content might be optimally handled. To serve as a thread throughout the book, I wanted an example that would cross all industries and organization sizes, so I've chosen new supervisor training. My hope is that even if you don't have new supervisor experience, it's a topic that you will likely deal with from either an instructional design or a learner point of view in the future. Plus, what organization couldn't use more and better new supervisor training?

I welcome you to our e-learning community of one. My sincere hope is that with this book, you choose to stay awhile.

CHAPTER 3

Project Management

Each module you create, curriculum you design, and LMS you launch is a project. They all start, proceed as work is done, and end. But is it really important to use a specific project management technique when you're the only member of your department?

Typically, project management helps coordinate teams to ensure that every member knows the activities required to complete an agreed-upon goal. As a department of one, you might think that project management won't add value to your work. However, following a project management framework can clarify projects for you, provide deeper visibility on next steps, better integrate your projects with others in the organization, and help provide metrics for return on investment to management.

Because you're the only resource, your project management style doesn't have to follow a strict structure for development. You may be the only resource as the member of a functional organization, so that each content area has a person doing a similar task to yours, but you don't directly work together (Figure 3-1). Or, you may be the only person in the entire organization who does what you do, and you are developing for all the functional areas (Figure 3-2).

Figure 3-1. Member of a Functional Organization

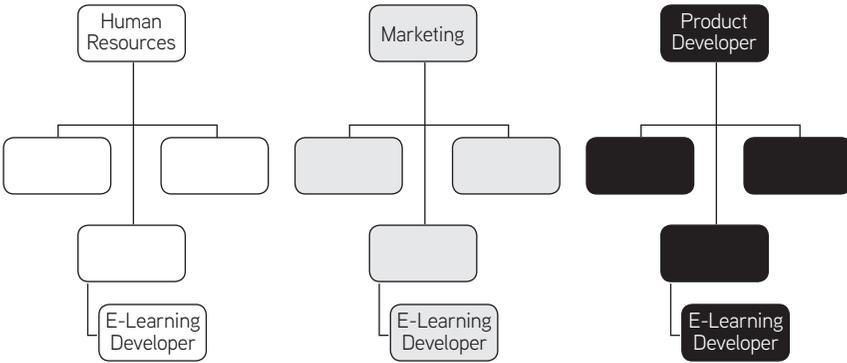
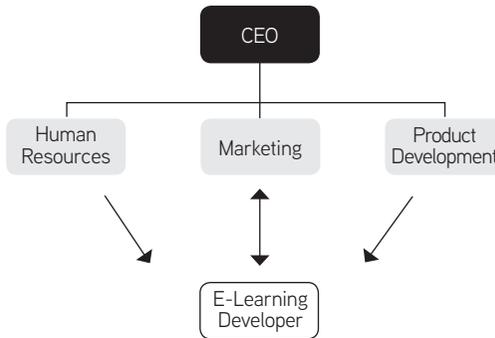


Figure 3-2. Only Developer in the Organization



Either way, systematizing the work that you're doing will make it easier for you to know what you're working on and share it with others who need access. The first step will be to figure out how you want this system to operate. Start by writing a list of all the topics for which you are developing e-learning. Then divide each of these topics into categories appropriate to your organization. These might include:

- **Length:** microlearning, intro module, full module
- **Type:** traditional module, interactive video

- **Priority:** due immediately, three to six months out, longer
- **Content category:** human resources, marketing, product development.

Use these categories to help build your prioritization. Most organizations are going to have a person or department whose projects are always highest priority and highest value, at least to them. Having all your projects laid out in a way that allows sponsors to see what you're working on and the estimated timelines will help minimize conflict. As a person who supports the organization in the development of projects, show any sponsors who have conflicts related to their timelines or prioritization exactly what you're working on and allow them to work it out with each other. You are only one person and have only so much knowledge, ability, and time. It can be particularly helpful to start another project while this discussion is happening; it increases the pressure on the sponsors to come up with a solution, because neither of their projects is being addressed.

Effective project management has numerous benefits to your work flow and development. In addition to the clarity it provides on the work that you're doing, it will make it easy for you to transition between projects when you need a mental break. And it will give you an idea of the amount of time that you spend on each project, which will help you assess costs and return on investment.

Research has shown that it takes at least 42 hours to develop an hour of e-learning; a 20-minute course would take 14 hours, and a five-minute course would take 3.5 hours (Defelice 2018). Depending on your level of experience, you can alter these times to your timeframes as you become more familiar with your pace.

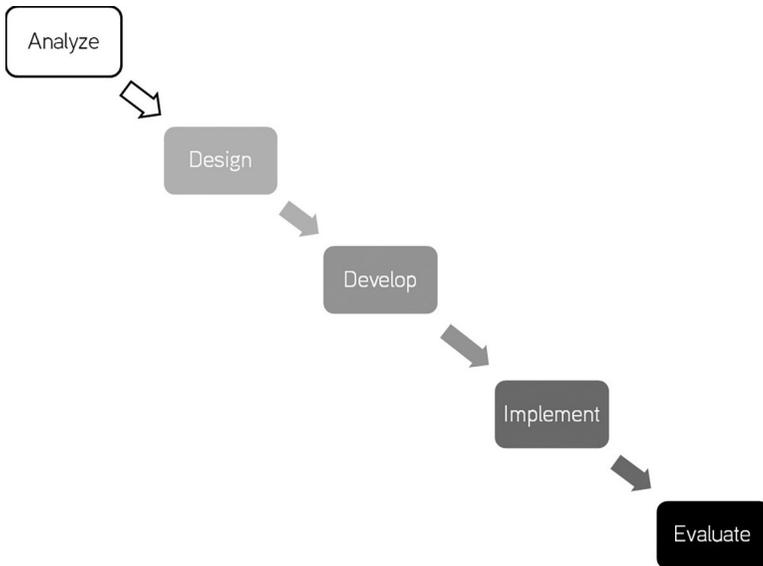
Now that you've gotten an idea of what you're going to work on and approximately how long it will take to develop, you'll need to decide how you're going to develop it, which will determine the style of project management that you use.

Styles of Project Management

Let's think about developing a series of modules on new supervisor training. The overall training concept will be to take current staff members and teach them how to supervise staff. At the end of the training program, they will be eligible to apply for supervisory positions. Look at the following two major methodologies for development and consider which you'd choose to create this training program.

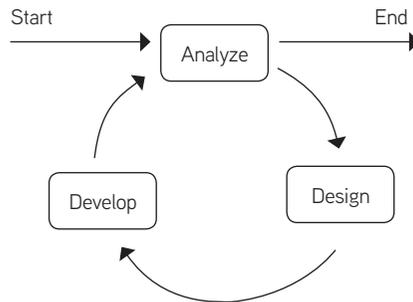
When you start learning about instructional design, the classical model that is taught is ADDIE: analyze, design, develop, implement, and evaluate (Figure 3-3). If you have a background in project management, this is roughly the waterfall methodology. You have a defined path that you follow; if something is incorrect in a preceding step, there isn't much you can do about it other than move forward or cancel.

Figure 3-3. ADDIE as Seen Through the Waterfall Methodology



Instructional designers have started to follow the lead of software developers, and some have begun to change their previous waterfall approach to an Agile practice. With a waterfall style of development, particularly with projects that are months in development, by the time a course is available to the learners, the concepts or technology may have changed. Although Agile is more iterative and incremental than ADDIE overall (Figure 3-4), there are two versions of Agile that take a more iterative or incremental approach. You can develop with either the iterative or incremental philosophy, or the two together.

Figure 3-4. Agile Model



The Successive Approximation Model (SAM), from Allen Interactions, is one iterative development model. It provides a minimum viable product, which the SMEs or learners try out to see how it works. Then a round of development is done to make changes and improve the images and voice-over; the training program is reviewed again, and then given a final review.

Incremental design has the developer divide the content into sections, or modules. The first module is finished, then the second, until all the content is available. A good example of incremental development is creating microlearning on specific topics and then aggregating them into a larger module once they're all completed.

As mentioned, the two can be combined, which many developers do. In this case, the construct for the entire concept is created roughly and then developed to completion in sections.

Throughout the rest of this chapter, I use waterfall and ADDIE interchangeably; know that both *ADDIE* and *waterfall* encompass all the options of either style. Let's look at the benefits and drawbacks of ADDIE/waterfall and Agile for e-learning development.

Back to the supervisor training example: How would this work? Let's say that you have cohorts of 30 people and the training will take a year to complete. If you developed this in the waterfall methodology, you'd spend months collecting information about the content. Then you'd design and develop the modules. Once they were completed, you'd beta test them, make changes, and widely disperse them. After the modules were launched, you would run evaluations of the pass rate, knowledge acquisition, and behavior changes to see how effective the content was. Depending on the number of training hours, you're likely looking at around two years of work before content is available to learners.

Creating this same training program in an Agile way, you might develop the modules as the learners are experiencing them. You would still do the initial needs assessment to build the overall structure of the course. You could then adjust the modules as you go. The first group of employees would receive a module, changes would be made based on their feedback, and the second cohort would have an updated module for their first interaction.

Neither one of these methodologies is empirically correct. You could make wonderful and effective training programs with either. An Agile approach can mitigate the drawbacks of having to wait a long time between development and feedback under the waterfall method. On the other hand, an Agile approach can also raise timeline concerns as content gets continuously revised, and subject matter experts can add overwhelming amounts of detail during later revision stages, all issues not present in a waterfall

method. It's simply a matter of knowing what works for your organization and the content. Table 3-1 is a summary of the advantages and drawbacks of each method.

Table 3-1. Benefits and Drawbacks of Waterfall and Agile

	Waterfall	Agile
Benefits	<ul style="list-style-type: none"> • Most widespread approach • Formalized framework • Established process • Entire project is completed at conclusion 	<ul style="list-style-type: none"> • Deliverable is available for review early and often • Customizable to meet the needs of any organization or project • Stylistically similar to software development
Drawbacks	<ul style="list-style-type: none"> • If the analysis is incomplete, the rest of the project will suffer from incompleteness or inaccuracy, or be canceled • Longer timeframe before a deliverable is available for review 	<ul style="list-style-type: none"> • Optimally need to run three cycles to start project development • Increases the potential for an incomplete or suboptimal final project being submitted to the client

It's important to note that you are not required to stick to one style of project management and use it across all your projects. You'll change the style based on the complexity of the project, the accessibility of your SMEs, and your timelines. Your organization may also have a project management office (PMO) or other organizational process assets (OPAs) that will give you a starting point for choosing a management style for your first few projects. A PMO is the part of the organization that oversees all projects. It can be very useful for finding OPAs.

Advice From the Trenches: Megan Torrance

Agile project management has been around since 2001, if we consider the writing of the Agile Manifesto (www.agilemanifesto.org) as the beginning of Agile in the software development industry. Agile project management is an iterative, incremental process

for guiding design and building projects in a highly flexible and interactive manner, focusing on maximizing customer value and fostering high team engagement. The Agile Manifesto set out a framework of values that would enable teams of software programmers to develop software in ways that allowed for changes in underlying needs and a continual discovery of requirements throughout the project effort. If you're working with software developers at your company, it's quite likely that they're using Agile.

With the success of Agile project management in the software industry, it comes as no surprise that learning and development practitioners have sought to adopt it; indeed, LLAMA, SAM, and other project management approaches are less linear than ADDIE. In many respects, the design-build aspect of software design and development is akin to that of instructional design and development, and this holds even stronger when we're developing e-learning or other digital learning experiences. Many teams have implemented Agile approaches with success.

These teams use Agile project management to scope the effort, define the tasks, estimate the work, set a schedule, deliver and release work products frequently and iteratively, and communicate with peers and clients, whether they are internal or external. Thus, it is distinct from the specific instructional design techniques and approaches that you might use, such as Thiagi's 4Door, the Six Disciplines of Breakthrough Learning, Merrill's Principles of Instruction, Allen Interactions' CCAF Model (Context, Challenge, Activity, Feedback), individualized instruction theory, High-Impact Learning, Bloom's Taxonomy, or Carla Torgerson's MILE framework for microlearning. Agile is also independent of the learning modality or medium and can be applied to e-learning, instructor-led training, microlearning, blended learning, performance support, virtual reality, or projects in which we create a social framework for informal learning.

As a cautionary note, there are several key differences between instructional design and software development work processes that should inform your adoption of Agile:

- Instructional designers need to focus on learning objectives and performance outcomes, in addition to functions and features that software developers build.
- Most instructional designers work on several projects at once, while software developers usually are dedicated to a single project.
- Instructional designers often need to wait for content or SME input and have to account for that downtime in their project plans. Agile software teams are typically in a continuous develop-test cycle with little downtime in between iterations.

These differences in the nature of software development and instructional design are sources of frustration for instructional designers in their application of Agile methods, or they lead to the development of new adaptations, such as LLAMA or SAM. Teams that make adaptations in their Agile project management approaches to account for these differences are finding success.

Your Organization's Culture for Project Management

The culture of your organization will play heavily into your development process. If you're at an organization with lots of competing high-priority projects, you'll need to assess the practicality of having three review cycles to effectively implement Agile. If the subject matter experts are difficult to contact and unlikely to give you all the information you need to develop your content, ADDIE might result in inaccurate training. The longer the time from the original needs assessment to the final product, the greater the probability that the information will change.

Here are some questions to help you consider whether ADDIE or Agile is the better project management style. These should be assessed on a project-by-project basis as the priorities and players change.

1. What is the availability of your subject matter experts for feedback?

- » **Not much:** Is it not much over a certain period, or are they never available? If you can get a dedicated block of time all at once, you may want to do ADDIE. If it's never much, then you may want to do Agile and fit in your review and information gathering during those short times that they are available.
- » **Lots:** You are very lucky! In this situation, the SMEs are likely going to give lots of feedback and have input on the project, so going with Agile will give them the fastest deliverable and the greatest ability to interact with the content.

2. How familiar are my subject matter experts with training on this topic?

- » **Not familiar:** This can happen if the organization is rolling out a new software or new initiative that hasn't been totally determined. In this scenario, you can wait until everything is decided and make this project your only priority to meet the deadline, implementing ADDIE and doing it start to finish in a tight timeline. Or, you could implement Agile knowing that you'll be redoing large portions of the analysis as the product changes and solidifies. If your organization could use the additional support in advocating for the learner's perspective in development, you could offer that with Agile.
- » **Very familiar:** Surprisingly, these tend to be the more difficult SMEs to work with because they're going to get very technical very fast, or they're going to want to cover tons of content that will be hard to incorporate into a single project. You'll want to spend lots of time building the relationship with these SMEs to be able to rein them in without shutting them down. This will be discussed in greater detail in the chapter on subject matter experts. This would be a good case for using an Agile methodology so that you can keep testing different types of content flow and add or remove content as you find gaps or extraneous information.

3. How experienced are the learners with this topic?

- » **Novice:** The less experienced the learners are with the content, the more time you'll need to spend in your analysis phase to gauge what they'll need to know before you can get into the content that the SMEs want to cover. You'll probably be teaching terms and acronyms. The beauty of novice learners is that typically the entry-level training will focus on

knowledge, which makes the evaluation and assessment easier. You could really go either way with a novice when choosing a methodology. ADDIE might make sense if the audience knows so little that it's easy to come up with the content they'll need. Or, if you're having a hard time assessing the knowledge gaps, Agile would be better to allow for more rounds of user testing prior to launch.

- » **Experienced:** Experienced learners will require pretesting to ensure that they have the foundational knowledge the SMEs expect. These training programs typically focus on skills and abilities. The focus of the instruction here is more on scenarios to teach and reinforce what we want learners to do after the completion of the course. Plan to build in lots of time for creating the evaluation and assessment. This would probably work better in Agile because you'll be adapting the content to a variety of learners and experience levels.

4. **Is there a hard deadline for when this content needs to be available?**

- » **As soon as possible:** More likely than not, this will be most of your projects. These are the ones that you'll want stakeholders to work with you on to determine actual priority. If you can get all the information up front and have limited edits, ADDIE will be the fastest.
- » **On a specific date:** Given the number of projects that you have in the ASAP bin, it'll be important to build in the time that these projects require to maintain the commitments that you agree to upon initiation. These are the optimal projects because you and the requester understand and agree to the parameters of the project. Ideally you'll work with ASAP and "whenever" requesters to get a firm deadline. This will vary

between ADDIE and Agile based on the perceived number of edits. If there won't be any, ADDIE works. If there will, Agile is better.

- » **When you can get to it:** This is the timeline to avoid at all costs. Work with the requester to get a specific deadline. The people who request these projects are usually the ones who want it as soon as possible but think that they're being nice by not asking for a specific deadline. If you end up in this situation with someone that you can't push to provide a specific deadline, make sure that you're continuously moving on this project even if it isn't with the regularity of the others. This is a situation when Agile feels like the right solution, but you can end up with a bunch of modules 80 percent done that you never finish. Be cognizant of this if you choose to go with Agile, where you get feedback but never find time to incorporate it.

5. How quickly can I update or revisit the training topic if the content does not meet learners' needs?

- » **Fixed schedule:** When you are supporting many clients for e-learning development, you may find yourself building a long timeline of projects. If you're doing this, it will be harder to build in time for fixes and updates. However, ensure that you allocate time for this or that your final products have a shelf life that's longer than your planning calendar goes into the future. ADDIE works well here because you know exactly what you need to do, can make the change, and publish it.
- » **Flexible schedule:** The greater the flexibility in your schedule, the greater the pressure to put out less than optimal projects to keep flow moving forward. Do what you can to avoid this, so you create a product that you're happy with before you launch

it to your learners. If you don't have something immediately following your next project, don't waste time or perfect the current project past the point of what you're doing with others. Take this time to focus on your professional development. Agile works well here because you can easily alter the content every time that you look at it.

Make Project Management Work for You

With all the suggestions provided here, it's really about customizing project management to meet your needs and those of your organization. Regardless of what you call it, if it's not adding value, stop doing it.

Planning the Project

The first step in any form of project management is to define the project and acceptance criteria. You need to have a clear understanding of what the sponsor expects you to provide in the end. Do not let them dictate how you go about solving the problem that they have. They should explain the issue to you, and you should be able to determine if it's actually a learning problem, and the best format for resolution. Consider this sample conversation:

SME: We are going to write a module on how to have difficult conversations.

You: What is the goal of the training?

SME: We want supervisors to know how to have a difficult conversation with a staff member.

You: What skills does having a difficult conversation entail?

SME: It will require supervisors to be self-aware. They'd need to be able to identify the specific behavior that they want a staff member to change.

They would then need to articulate that behavior to the staff member in a legal and ethically appropriate manner.

You: Are you saying you need supervisors to identify the behavior in question and have the conversation with their employee regarding that behavior?

SME: Yes, and they have to reflect on how the information is communicated. Some supervisors don't know how they come across, which can become problematic legally. The employee either doesn't realize their behavior is an issue or is offended by how it's presented. Either situation is a problem.

You: Ideally this training will have a supervisor identify behaviors with several employees and get their feedback, right?

SME: That sounds great. It would help if we could coach them if they're doing it incorrectly.

Please note that the length of time and frequency were not mentioned among the questions asked of the SME. As the content comes together and you see the scope of the project, you'll be able to make a recommendation. For this training, you might do a branching project that has a coach to scaffold in content for less experienced supervisors. A simulation might also work well for this project.

In all forms of project management, this first phase is the most critical. Your costs are the lowest and it is the easiest to change all aspects of the project. As a department of one, costs include your salary or time on the task. If you implement Agile, your costs for changes will stay lower than with other forms of project management, but with each iterative cycle, the amount of changes should decrease.

If your projects vary significantly, you'll be determining your project sponsors, stakeholders, communication, and risk plans during this phase. If your projects are within a functional area, this may be something you

can set at the beginning of your job that will stay fixed across many of your projects.

Project Sponsors

You probably came to be a department of one because someone in your organization said, “Hey, wouldn’t it be great and save lots of money if we hired someone in-house to do all this work that we’re outsourcing or that we want developed but can’t afford?” This person will be your most important sponsor. They advocated for your position and probably hired you. Ensure that your development aligns with their strategic goals.

The project sponsor will request projects and provide you with their scope. You may have someone who sponsors you as an asset within your organization, or you’ll have sponsors like the requester from the SME conversation example. This person will advocate for the things that you need with the executive committee. Spend your time building a strong, positive relationship with this person.

Stakeholders

The acceptance criteria are going to be assessed by the project’s stakeholders; it’s one of the most important parts of this process. Typically your stakeholders will involve a combination of the following:

- **Project sponsor:** This person reports to the executives on what your “department” is developing.
- **Subject matter expert:** The person responsible for providing the content will need to sign off on the training program’s accuracy.
- **Your supervisor:** You’ll need to obtain approval from your manager or supervisor for projects you complete.
- **End learner:** This one is easy to overlook when you’re new to e-learning development. You need to run the final project in a beta

test with the end learners to ensure that the content is functional and understandable.

- **Technical team:** Having your information technology team involved is particularly crucial with e-learning, and ensures their familiarity with the content for the inevitable support calls they'll receive. As your content becomes increasingly technical, having the team involved early in the process improves the probability of project success.
- **Requester:** In some organizations, you will be booked like another asset of the organization. In this case, the people who request work from you are not your project sponsor or your supervisor.

Communication Plan

Because you are the only member of your department or only assignable resource, you don't need to spend time developing a team assignment or plan. You do need to spend time deciding how and when to convey information to stakeholders.

If possible, share your project information on an intranet, like SharePoint. By allowing the stakeholders to pull information whenever they want without asking you for access, you'll save tons of time answering questions. Unless there is a proprietary reason not to, share all your notes related to the development of your projects in this same space. That way if there's ever a question about why something was done or when a decision was made, it's all in one place. If it isn't feasible to share your notes, consider making folders and shared documents on a project-by-project basis to share information with the stakeholders specific to this project.

If you're implementing Agile, you'll have lots of regular check-ins with stakeholders to show them the latest deliverables and obtain their feedback. With ADDIE, you'll want to schedule something on a regular basis to keep yourself on track.

Risk Management

The biggest risk is, of course, you. If you “go down,” the entire project will come to a screeching halt. That said, being the project manager, designer, developer, and all around everything for this project, you’re likely to be more cognizant of your availability and needs.

Here’s the beginning of a risk checklist you can use as you start each project (Figure 3-5).

Figure 3-5. Sample Risk Checklist

Risk: Me

- Vacation Time _____
- Family Commitments _____

Risk: Infrastructure

- Backup Times _____
- System Upgrades _____
- Cloud Downtime _____

Risk: SME Availability

- Vacation Time _____

Risk: Other Projects

- _____
- _____

The second biggest risk will be the device on which you work. Unless you’re saving to a cloud (and even if you are), you’ll want a good backup system. One of the less discussed benefits of working with a team is that it pushes you to save to a network location to allow multiple people to work on or review a file. Unfortunately, with several of the larger e-learning authoring programs, it is recommended to save locally to decrease the probability of file corruption. In a perfect world, your computer would be set to

back up regularly to a cloud-based drive. Worst case, you can use backup software to regularly copy files to an external hard drive.

The other risks are mitigated to an extent by the style of project management that you've chosen. If your organization is unlikely to give full information and commit to content at the beginning, choosing Agile will increase your likelihood of a more successful final product than ADDIE.

Asset Management

Asset management is another area where a department of one can get sloppy, and it's important to set up a structure as early as possible. Assets will take up large amounts of hard drive space, and you'll want to ensure access to everything you need without compromising your processing power with limited space.

Ideally you'll store a copy of all the assets together, so a completed project with the editable e-learning authoring files, audio, images, and video will all be in a single location.

E-Learning Authoring Files

Because these are the repository for all the custom coding and games you've created, you'll need to access these frequently to refer to what you've done. Ensure that you save versions in remote locations so that if anything happens to your local system, you still have the editable files.

Audio

The final audio will be embedded within the e-learning authoring file, so keeping the audio for the voice actors separately isn't a requirement long term. Depending on your audience, the audio may be as simple as licensed background music, which could be easily stored on a separate drive or CD and accessed as required. Or it could be as complicated as individual voice

actor files that are spliced together in scenes with interactions. This is covered in greater length in the chapter on audio.

Images

As a department of one, having a stock asset library will dramatically improve the quality of what you create, lower production time, and minimize the hard drive space that you'll need to keep available. Unless you're doing major editing to the photos from the library, do not keep them separately. Simply keep a list of the used images and licensing information and delete the files. If you need them again, download them from the library.

If you are creating your own images, consider using external hard drives or cloud storage. Asset management software is particularly helpful for tagging the content for future use. Assuming that you have a limited budget to complete the work, the stock image library and external hard drive are a better use of resources than creating your own images and purchasing a cloud-based asset management system. Of course, this is dependent on your organization and content. If stock content is unavailable, research shows that creating imagery reflective of the audience will be better received than decorative visuals. This is covered in greater length in the chapter on graphics and video.

Video

Video is where you can really get into trouble with space. If you're doing video, you need to plan to have multiple external hard drives. As of publication, Internet speeds do not keep up with real-time video processing, and the corruption rate is too high to be comfortable with editing directly from the cloud. This is covered in greater length in the chapter on graphics and video.

Next

It is not possible to overvalue project management in your position. Don't bury yourself in paperwork, charters, and notifications, but plan to spend a certain portion of each day managing your projects.

As early in the planning of a project as possible, choose the project management methodology that will best serve your development. If it doesn't work, try a different one the next time. Customize project management to work for you, your projects, and your organization.

The members of the organization that will most directly affect your ability to meet your project timelines are the subject matter experts. Building a positive relationship with them and managing (and exceeding!) their expectations will be an important part of your success.

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About the Author



Emily's passion is sharing knowledge with learners on any topic. It started at an early age, when she would help her father build presentations for his medical conferences. One of her favorite games to play as a child was "Respi-baby"—a simulation game for neonatologists on infant respiration therapy. Her dad liked to joke that if his 10-year-old could save the babies, the medical students working for him should be able to as well.

Emily is one of the many e-learning developers who found herself doing this job by taking on another project on a completely different career path. Originally she planned on working in market research and found herself creating marketing materials with instructional videos. During that time, she earned a master's degree in instructional science and technology at night. She then went on to work for the federal government, a startup, a museum, and several nonprofit organizations.

She enjoys working with animals, having volunteered in equine- and dog-assisted therapy. She is a classical bassist and has performed in several community orchestras and musicals. She travels extensively and tries to learn about the languages and cultures wherever she goes. Emily has enjoyed living all over the United States. She spent her childhood moving progressively eastward. As an adult, she's been discovering the U.S. coasts. She resides in Portland, Oregon, with her lab, George.

You can learn more about her projects at www.idemily.com.