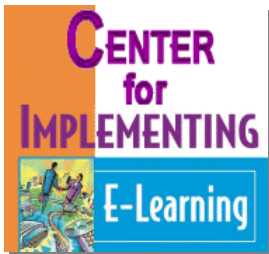
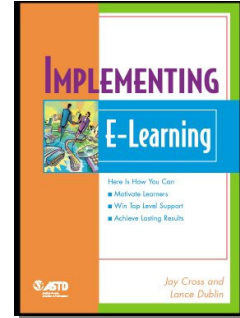


Worksheet for Developing an eLearning Implementation Action Plan

By Jay Cross and Lance Dublin

Derived from Chapter 10 of *Implementing eLearning*, a 140-page guide to building a successful change management and internal marketing plan for your organization. You may purchase copies of *Implementing eLearning* from ASTD Press or Amazon.



If you find our approach and this planning template of value, please send us your ah-ha's and plans so we can share them on the book's companion website, www.InternetTime.com/book.

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Worksheet for Developing an eLearning Implementation Action Plan

Instructions in brown are for you. Delete them after you've put together your Action Plan by answering the questions that follow.

If you've read the book, insert the information you developed there into this worksheet.

Then go back through the worksheet, making things consistent, refining your plans, adding details as appropriate, and deleting things that don't make a difference. Add a schedule of events.

What remains is your eLearning Implementation Action Plan. Congratulations.

MEMO

Date:

To:

From:

Subject: eLearning Action Plan for _____ Corporation

The profit potential of eLearning at _____ Corporation is staggering, but it won't be successful without your support. That's why we ask that you review our findings before we meet. Are we on target? Might you suggest things we can do better? Do you buy our proposals? Can we count on your support?

This memo summarizes how we think _____ Corporation should implement eLearning and how it will benefit our organization. We will share how we plan to integrate eLearning into our corporate culture and operations, and how the company stands to gain from the proposed initiative.

We just completed an analysis of what we need to do to maximize our ROI from eLearning. We began by addressing these key issues:

1. What can we do to prepare our employees, customers, and partners to get the most from eLearning?
2. How can we improve the odds of success?
3. How do we keep people coming back for more?

In the past, offering individual courses and workshops, we were content to assume that we knew the answers to these questions. Those individual courses didn't justify market analysis and campaigns.

eLearning is a different matter, because:

- eLearning is an ongoing process, not an event
- eLearning represents large-scale organizational change
- not everyone is on board
- a large investment is at stake
- achieving results is no longer optional

- many people do not understand what eLearning is
- skeptics are critical of its effectiveness.

Our in-house goals are to:

- motivate learners, managers, and the entire organization
- win the support of our varied stakeholders
- build an eLearning infrastructure
- achieve lasting results.

In a nutshell, our action plan is to...

Insert your elevator pitch from chapter 6. Briefly describe your proposed brand identity, target markets, and positioning.

Challenges

(from chapter 1)

1. What is your gut instinct about the challenges you will face?
2. Take a look at factors within your organization that may help or hinder your implementation. How many good signs do you see and what are they?
3. What are the bad signs you need to watch out for or plan to address?

Business Issues

(from chapter 2)

The primary business issues involving our eLearning are:

1. Who are the major stakeholders? Owners? Managers? Workers? Partners? Outside customers?
2. How does your proposal support the vision of management?
3. How does this eLearning create value for your stakeholders?
4. What trade-offs are you making?
5. Describe the risk in your proposal and compare it to the rewards.
6. How do you think your customers will feel?
7. How are you applying the 80/20 rule? What high-leverage groups or activities have you chosen?
8. What impact will your initiative have on the bottom line?
9. How does your eLearning focus on core strategic issues instead of context?
10. Describe the cost-benefit analysis for your proposal.
11. The primary change management issues involving our eLearning are: What leads to the sense of urgency around this project?
12. Who is on your guiding coalition?

13. What corporate changes are you attaching your eLearning wagon to?
14. What short-term wins do you foresee?
15. What stakeholders can you recruit for your coalition?
16. How will you anchor eLearning in your culture?
17. How do you plan to recruit innovators and early adopters?
18. Who are our primary customers? Employees? Salespeople? Customers? What is the clear and compelling promise of your brand?
19. Describe the relationship you seek with your customers.

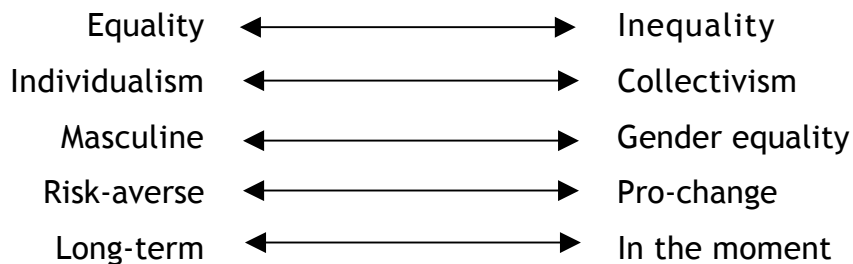
Organizational Culture and Change

(from chapters 3 and 4)

We must keep in mind that our organizational culture is:

List prime characteristics of your culture here:

1. What artifacts typify your organization's culture?
2. What are the distinct features of your corporate culture?
3. Where do you see your culture on Hofstede's scales?



And how might this encourage or block eLearning?

4. We are preparing to support our eLearning implementation through leadership. Which organizational leaders are backing our efforts and why?
5. Who are our change agents and why? What will we do to support them?
6. Are the learners prepared for this change? Is our organization prepared for change?
7. Is our technology up to the task?

8. How will the initiative be governed?
9. Do the skills, knowledge, and abilities exist in our organization to ensure the success of our implementation?
10. What is our vision? [A vision statement is a picture of what you want the future to look like- what you aspire to become, to achieve, to create.]
11. What is our mission? [Your mission examines the project's purpose and expresses its sense of value. Perhaps most important, a mission inspires people to stand out, and it guides leaders.]
12. What are audiences do we need to reach with our communication plan?
13. What are the messages these audiences need to hear, and when?
14. What are the communication vehicles and activities we'll use?
15. What will we do increase awareness?
16. What will we do to increase involvement?
17. What will we do to increase commitment?

Market Research

(from chapter 5)

1. We undertook the following research to learn about:

- our consumers, the learners
- consumer behavior
- competitors for consumers' attention
- sponsors
- our brand image
- organizational goals
- our industry's environment
- the macroeconomic environment
- trends in eLearning technology

2. *Our consumers:* We've identified and described the target customers for our eLearning.

The consumers, your customers, are the most important topic of all. Use the 80/20 rule to select the groups with the most likely impact. Then describe each group using a target consumer description form. Two forms are provided below. See figure 5-1 for some examples of how to do this.

Target Customer Description

Identity:

Number:

Location:

Tenure:

Turnover:

New hires:

Learning needs:

Line sponsor:

Bottom-line impact expected:

Target Customer Description

Identity:

Number:

Location:

Tenure:

Turnover:

New hires:

Learning needs:

Line sponsor:

Bottom-line impact expected:

3. *Competitors:* We've identified the major competitors for the time and interest of our employees.
 - What or who *are* your major competitors?
 - What other corporate priorities will you be competing against?
 - What objections do you expect from your customers?

4. *Sponsors:* We've coordinated our plans with many people in the organization.
 - Who are our executive sponsors? What's in it for them?
 - Who are our line management sponsors? What's in it for them?
 - Who are our technical sponsors? What's in it for them?
 - Whom must we rely on for success? What's in it for them?
 - How do we plan to get their backing and support?

5. *Organizational goals* We know and support what our company is trying to accomplish
 - What are our organization's overall goals?
 - What is the current mandate from executive management?

- How does our eLearning initiative relate to its achievement?

6. *Our industry's environment* in light of the direction in our industry, we've identified trends that will influence our eLearning initiatives.

- What are the major trends in our industry?
- Is solution selling replacing point sales?
- Are customers going for self-service?
- Is automation changing the flow of work?
- Is the enterprise becoming more international?
- Are processes being outsourced or moving overseas?
- Are competitors introducing new generations of products?

7. *Macroeconomic environment.* We expect that global events will affect our industry and its need for learning.

- What political, economic, and social changes in the world at large may affect our business?
- What impact do you expect from increasing workforce diversity? Aging of the workforce? Economic volatility? Declining half-life of knowledge? Faster pace of business? Increased regulation? Globalization? International terrorism? Declining public education standards? Other factors?
- How do we plan to adapt to the changes deemed relevant to our industry?

8. *Learning technology:* In all likelihood, the next three years will see shifts in eLearning technology, and we need to lay the groundwork for adaptation now as...

- learning and knowledge management converge
- eLearning becomes a Web service
- simulation replaces linear subject orientation
- eLearning and other enterprise-wide systems converge
- content becomes more industry-specific
- extent of high-quality generic content increases in core areas
- individualized learning prescriptions are based on competency assessments

- competency management replaces needs analysis.

If you've shared your findings with others, perhaps via your intranet, describe the confirmation or suggestions you've received from them. Your market research could fill an extensive report. Don't let it. Less is more.

Go back through your findings and eliminate anything that doesn't matter. After all, not every industry trend or competitor is going to make even a ripple in your eLearning pond. Less is more. Pick the two or three most striking findings in each category, and use them to write a terse market research summary.

Marketing Design

(from chapter 6)

Effective consumer marketing strategies rest on a foundation of

- a brand that creates a reputation that keeps customers coming back and attracts new customers
- market segmentation that optimizes results by leveraging the most appropriate groups of customers
- a position that places your product in the "sweet spot" in the mind of the customer.

We have used these concepts to develop our eLearning implementation plan:

[Please restate your elevator pitch here.]

1. What do we want our organization and services to be known for? What do we promise our customers?
2. What is our functional value proposition to our consumers?
3. What is our emotional value proposition to our consumers?
4. How will our brand identity give meaning to the lives of our customers?
5. Just as a brand identity may reflect a person (personality), it may reflect an organization and its culture. What attributes of your organization might you incorporate into your brand identity?

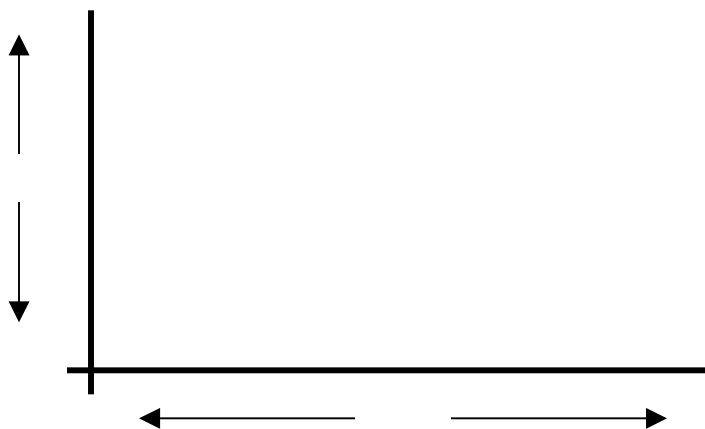
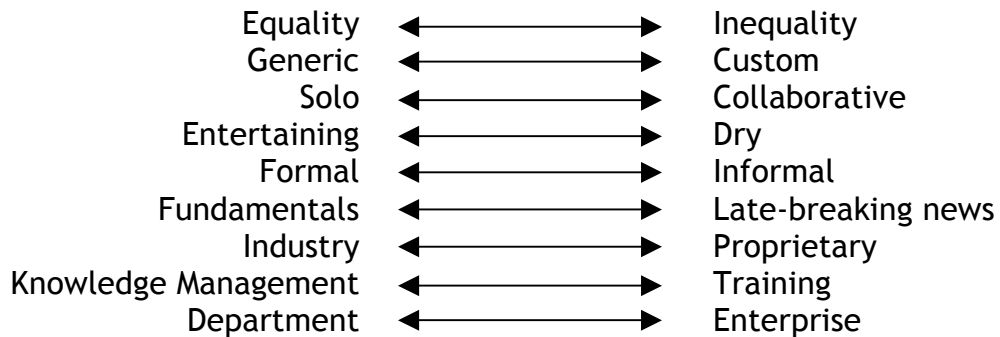
With these factors in mind, the brand identity of our eLearning consists of the following elements:

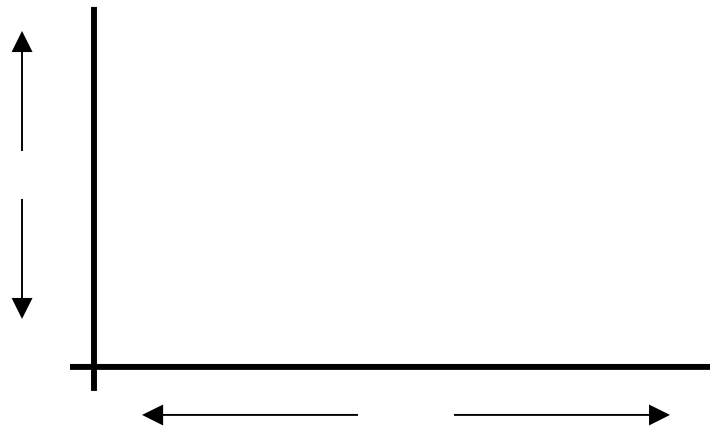
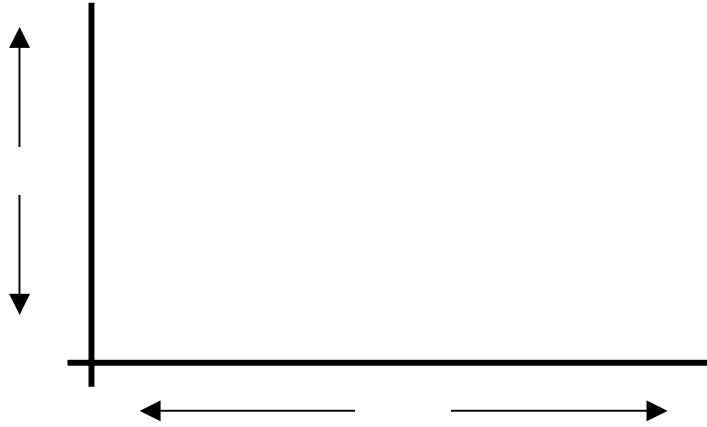
- Brand name:
- Brand symbol or logo:
- A few core values:

6. What are our target markets and why did we choose them?

7. Which market segments will we focus on?

8. Choose the most relevant pairs of scales to show where your eLearning efforts are starting and where we'd like to take them in the coming 12 to 36 months.





Launch

(from chapters 7 and 8)

Include the materials you developed in chapters 7 and 8. For example: a three-paragraph email announcing the eLearning initiative, a draft brochure for the program, an email invitation to an open house and demonstration, and a publicity poster.

1. List five ways you intend to create "buzz."
2. List five common obstacles to eLearning, and for each explain how you propose to overcome it.

[If you are receiving help from your marketing communications department, you're naturally going to describe what they are doing for support and show any samples they have developed for you.]

Sustaining eLearning

(chapter 9)

1. How will we provide feedback to learners and their bosses?
2. How will we handle complaints?
3. How will we assess customer satisfaction?
4. How will we keep our focus on the customer?
5. How will we show our customers that we respect them?
6. Do we plan to use "mystery learners"?
7. How will learners be able to co-create future learning events?
8. Are we setting up a learner council?
9. Are experienced employees to mentor new employees?
10. How will we support the development of communities of practice?
11. How frequently will we provide progress reports to stakeholders?
12. What will be in stakeholder reports?

13. How will we identify or solicit new challenges?
14. How will we monitor satisfaction?
15. How will stakeholders request improvements or additions?
16. Are we setting up a board of advisors or a steering committee?
17. Is professional development of one's direct reports in managers' job descriptions?
18. Have supervisors themselves learned to support and reinforce their subordinates' learning?
19. What systems need to be changed?
20. What performance management systems need to be changed?
21. What formal and informal rewards and recognition systems will you leverage?
22. Hitch a ride! What organizational initiatives will you seek to become part of?

It's a shame when people work hard to create a program and then blow it by under-investing in packaging. We've presented the development of your eLearning plan as a fill-in-the-blank exercise. Filling in the blanks is not all you need to do.

Have some old hands and people unfamiliar with your project read through your plan. Pay attention to their feedback. Tighten up your logic and your writing. A couple of months' work justifies a few days' polishing to sell your ideas.

If you can do so without giving away proprietary information, we encourage you to share your plans and campaigns with others via the [Center for Implementation Excellence](#). Write or call Lance to submit your plans to the site.



The e-Learning Tune-Up: Getting Peak Performance from Your e-Learning

No doubt about it. If you owned an expensive car, you would regularly take it in for a tune-up. Shouldn't you do the same with your much more costly e-learning?

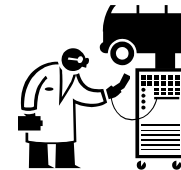
Companies everywhere are trying to do more with less. The way to put off major purchases is getting the extra mile out of what you've got, spending a little on 'preventive maintenance' and increased performance rather than a lot on a new vehicle or more 'options'.

Why bring in outsider experts? For one thing, you're just too close to your own situation. For another, they have experience; they know their way around e-learning and have access to a wide network of technical specialists. They've been under the hood of many an organization's e-learning, knowledge management, performance support, and training systems. They know what's worked and what's failed in other organizations. They bring the best practices from Six Sigma, total quality management, business process redesign, and performance consulting. Their diagnostic tools and processes pinpoint where e-learning programs and corporate objectives are out of alignment. They can spot immediate opportunities for cutting costs, increasing participation, gaining executive support, and delivering meaningful business results.

Bottom-line, it makes good business sense to tune-up your existing e-learning to ensure its running at peak performance.

What Does the *e-Learning Tune-Up* Cover?

Your *e-Learning Tune-Up* is uniquely tailored to your organization. In our initial planning conversation we agree on the specific areas you want to focus on and determine the overall scope. Areas we might look at include:



- business case & learning/ e-learning strategy
- ROI (return on investment) & ROE (return on expectations)
- e-learning solution set - components and mix of delivery methods
- content and instructional design
- tools, technologies and infrastructure
- internal marketing, communication, and change management
- evaluation and metrics – both qualitative and quantitative
- organization and processes
- sponsorship and governance
- roles and responsibilities



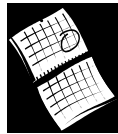
What is the *e-Learning Tune-Up* Process?

The *e-Learning Tune-Up* process is straightforward and consists of just three steps: 1) data collection; 2) data analysis; and 3) recommendations. Data collection typically includes interviews, reviews and audits; it might also include surveys and focus groups. We look at not only the specifics of your e-learning, but also your organizational culture and operational environment. In data analysis we

look at your past successes and failures as well as the new data to identify trends and opportunities. And, finally we give you a prioritized and ranked list of recommended 'quick-hits' – actions you can take immediately to increase both the efficiency and effectiveness of your e-learning.

What Will I Get?

After your *e-Learning Tune-Up* is completed you will receive a PowerPoint presentation you can share with senior management and other colleagues. It will document the entire process and contain a summary of all of the data, analysis and recommendations. In addition, you will become a member of the *e-Learning Tune-Up Best Practices Consortium*. As a member, you will have access to the best practices from other organizations shared through structured conference calls and virtual meetings.



How Long Will This Take?

Your *e-Learning Tune-Up* will take from 3-6 weeks, depending on the agreed upon scope and availability of the necessary data.

What Can I Expect?

As a result of your *e-Learning Tune-Up* you can expect to learn what you and your organization can do to improve to get peak performance from your e-learning - immediately. The recommendations will highlight short-term 'quick-hits' to improve both the efficiency and the effectiveness of your e-learning, but also include longer term 'improvements'.



Who Will Do the Work?

Lance will personally lead your *e-Learning Tune-Up*. But, he will also ask you to help and, as the need arises, tap into my extensive network of specialists. A work plan for your *e-Learning Tune-Up* - detailing activities and responsibilities - will be one of the first deliverables.

Get a Free Quote!

To get a free quote on what it will cost for your *e-Learning Tune-Up*, just give Lance a call at 415-759-1258, or email him at ldublin@pacbell.net. He's looking forward to talking with you and determining whether an *e-Learning Tune-Up* makes sense for your organization.



www.InternetTime.com

Jay Cross also helps organizations make sound eLearning decisions. He and Lance work jointly and independently, depending on your needs.

Remember the old story about the retired engineer who's called back to work to fix a boiler? He raps it once with a hammer and asks for a fee of \$10,000. Incredulous, the management asks how he can charge so much for one tap with his hammer. He presents an invoice:

Boiler Repair

Tap once on boiler ----- \$1
Knowing where to tap ---- \$9,999

In the realms of eLearning, marketing, project management, design, publicity, and boosting morale, Jay knows where to tap. Maybe a tap is all you need. Call Jay to explore, 1 510 528 3105 or email jaycross@internettime.com.

Action Plan version 1.1
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