e-Learning Methodology Toolkit
How to use this toolkit

What is this toolkit?

This toolkit presents our an overview of our e-Learning methodology and tools to help you put it into practice when you carry out your e-Learning projects.

The toolkit contains templates to support you in gathering information, analysing, designing, developing and evaluating your e-Learning projects. It also contains templates to help you produce the necessary documentation you need to ensure that you are on track and deliver what is needed when needed.

Who is it for?

This toolkit contains a range of documents that can be used by e-Learning project managers, instructional designers, developers and subject matter experts.

How do I use it?

The toolkit contains a diagram with an overview of our e-learning design methodology.

Each phase of the process is numbered and contains a set of documents that you can choose to use.

You can decide what documents to use and when. Use the toolkit as a resource to guide you and help you stay on track.
The above is our e-learning methodology – including process, templates and document outputs used in the whole e-learning design and development cycle.

* Documents in **RED**: These are **required outputs**. Your project should include this documents.
* Documents in **GREEN**: These are templates to aid you in the analysis, design and development of your project. They are not mandatory.
This document is optional and can be used when you have limited background knowledge re the project and need to extra info to support your design.

### Needs Analysis

#### Business context

<table>
<thead>
<tr>
<th>Business problem:</th>
<th></th>
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<tbody>
<tr>
<td>What business problem or project needs addressing?</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Success measures:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>What are the most critical outcomes for this project? How will you know it has been successful?</td>
<td></td>
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</tbody>
</table>

#### Skills and Content

<table>
<thead>
<tr>
<th>Domain Knowledge</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Does the audience have any subject matter expertise with the tool or topics? Do they have relevant pre-existing knowledge or workflow understanding?</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Technical Knowledge</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>What is their likely comfort level with the topic? Likely experience with similar applications/products/processes?</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Key Topics:</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>What are the key topics that the training should address – how do they link in to the skills the audience should acquire?</td>
<td></td>
</tr>
</tbody>
</table>
What should the audience know after they have completed the training?

<table>
<thead>
<tr>
<th>Application:</th>
<th>What must your audience be able to do at the end of the training? What tasks or activities must they be able to perform that they can not now do? What prevents them from doing the task now? What constraints are they likely to face in applying their new skills?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domain Knowledge:</td>
<td>Is this a new or different subject matter? Is this a new tool/application? Process/workflow changes?</td>
</tr>
<tr>
<td>Technical Knowledge</td>
<td>• What functions do they need to know? • When will they use those functions? • Where will they use the application? • Why will they use the application? • How will they use the application? • How much/often will they use the application?</td>
</tr>
<tr>
<td>Key topics:</td>
<td>What are the key topics the training should cover</td>
</tr>
<tr>
<td><strong>Who comprises the audience for the training?</strong></td>
<td></td>
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<tr>
<td>------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td><strong>Current user base:</strong> Who is currently using this module?</td>
<td></td>
</tr>
<tr>
<td><strong>Tasks:</strong> What task or job does this training support?</td>
<td></td>
</tr>
<tr>
<td><strong>Demographics?</strong> How many people are likely to require training? Where are they located (single site, multiple sites)? What language do they speak? Are they new employees or existing?</td>
<td></td>
</tr>
<tr>
<td><strong>Reasons for Taking Training?</strong> Why would someone want to take this training? What is the likely interest level? What's in it for the audience? What are the participants expectations?</td>
<td></td>
</tr>
<tr>
<td><strong>Resources?</strong> What resources will be or are currently available to support training rollout? (e.g., classroom workshops, computer/internet access, super users, etc.).</td>
<td></td>
</tr>
<tr>
<td><strong>Timeframe?</strong> When will your audience take the training? Are there constraints on the duration or time window of the training delivery? What are the consequences if the training is not conducted on time?</td>
<td></td>
</tr>
<tr>
<td><strong>Other Considerations?</strong> What challenges do participants currently face in carrying out this task? What will happen if we don't train in this task? What is the consequence if the task is performed incorrectly after training?</td>
<td></td>
</tr>
</tbody>
</table>
### Previous training?
Have users already completed or attended training in these topics? If so when and what did they learn?

### Training Strategy (For roll outs)

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is there a training strategy to accompany this training? (document with schedule for rollout, objectives etc)</td>
<td></td>
</tr>
<tr>
<td>How will this training be rolled? In phases? By location? By user groups?</td>
<td></td>
</tr>
<tr>
<td>What other support initiatives will accompany the training? (documents, train the trainer, FAQs, targeted helpdesk etc)</td>
<td></td>
</tr>
<tr>
<td>Is there content available to use as a basis for training materials? If so in what format?</td>
<td></td>
</tr>
<tr>
<td>Will the training be delivered in any language other than English? If so what are the impacts for our deliverables?</td>
<td></td>
</tr>
</tbody>
</table>

### Usage analysis of existing training and support around the module

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who is using the training? Location, language, number of users</td>
<td></td>
</tr>
<tr>
<td>Learning goals Is the lesson teaching users how to DO something? Are there enough practical examples and opportunities for users to practice their new skills? What should the lesson be teaching users to do? What is the lesson not teaching that is now required?</td>
<td></td>
</tr>
<tr>
<td>How does the &lt;support team&gt; use the training?</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>When does &lt;support team&gt; recommend the lesson to users?</td>
<td></td>
</tr>
<tr>
<td>How does &lt;support team&gt; recommend or encourage its use?</td>
<td></td>
</tr>
<tr>
<td>When does &lt;support team&gt; promote the use of the lesson?</td>
<td></td>
</tr>
<tr>
<td>Is the lesson used in combination with face to face workshops?</td>
<td></td>
</tr>
<tr>
<td>Is the lesson used instead of face to face workshops?</td>
<td></td>
</tr>
<tr>
<td>Is there any follow up from &lt;support team&gt; after a user has completed the lesson?</td>
<td></td>
</tr>
<tr>
<td>Does &lt;support team&gt; use the lesson to train its own support staff?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Support</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>What types of questions does &lt;support team&gt; receive re this module?</td>
<td></td>
</tr>
<tr>
<td>What is the biggest hurdle or issue users have with this module?</td>
<td></td>
</tr>
<tr>
<td>What parts of the module are most difficult for users to learn about?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Future plans for the module</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Rollouts:</td>
<td></td>
</tr>
<tr>
<td>Are there any module rollouts coming up?</td>
<td></td>
</tr>
<tr>
<td>If so when and who are the users?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Module Updates:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Are there any significant updates to the module planned? Will these updates require training?</td>
<td></td>
</tr>
<tr>
<td>Will existing courseware require modification?</td>
<td></td>
</tr>
</tbody>
</table>
e-Learning Intake Worksheet

Training Goals
1. What business problem or project needs addressing?

2. What change will you see in the business after this training?

3. What are the most critical outcomes for this training module? How will you know it has been successful?

4. What does the learner need to know how to DO by the end of the training?

Learners
5. Who are the learners for this e-learning and where are they located?

6. What do these learners already know about the topic?

7. Have the learners received any type of training on this topic? If so when? What was covered?

Content
8. What key topics should the training cover (concepts and functional aspects of the software?)

9. Will you need the training to cater for different user groups? (e.g. activities, examples and concepts for account managers need to be different to those needed by front office staff)

10. What scenarios should be used to describe each concept and functional aspect? Please include at least 2 correct and incorrect actions in the scenario. For incorrect actions please explain the consequences and why user should not do this.

A scenario is a typical person carrying out a typical task or asking a typical question. For example a front office manager is asked to run a X report by their account manager in order to verify what overdues are coming up in the next week.
10. Is content on the topics already available?

11. Does the training need to be translated? Into what language?

12. Can the scenarios supplied be used in the localization?

13. How will the training be used? Is there a training strategy in place?
This document serves as a guide as to what types of deliverables we can create.

# Delivery/ Development Matrix

<table>
<thead>
<tr>
<th>Training Requirement</th>
<th>Training</th>
<th>Performance Support</th>
<th>e-Learning</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Face to face workshop</td>
<td>Phone conference</td>
<td>Live Web cast</td>
</tr>
<tr>
<td>Product, &amp;/or policy, &amp;/or process</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Systems – New User</td>
<td></td>
<td></td>
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<tr>
<td>Systems – Major Change</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Systems – Minor Change</td>
<td></td>
<td></td>
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<tr>
<td>Systems – Skill Assessment</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Knowledge Assessment</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
This document serves as a guide as to what types of deliverables we can create

### Delivery/ Development Matrix

<table>
<thead>
<tr>
<th>Offering</th>
<th>Function</th>
<th>Possible Use</th>
<th>Time to develop</th>
<th>Software used / Hosting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screencast Demo</td>
<td>A video that demonstrates how to complete a task. No interaction – the learner watches</td>
<td>System demonstrations during workshops. New system rollouts System updates System Training refreshers</td>
<td>0-6 weeks for 1 hour module</td>
<td>• AuthorIt + Captivate • Captivate Hosted on e-Campus or Intranet.</td>
</tr>
<tr>
<td>Screencast Tutorial</td>
<td>A video that demonstrates how to complete a task and then prompts the learner to mimic the steps. Medium interaction – the learner watches then follows.</td>
<td>System face to face trainings. New system rollouts System updates System Training refreshers</td>
<td>0-6 weeks for 1 hour module</td>
<td>• AuthorIt + Captivate • Captivate Hosted on e-Campus or Intranet.</td>
</tr>
<tr>
<td>Screencast Test</td>
<td>A video that asks the learner to complete an activity. The learner receives feedback after completing the task. High interaction.</td>
<td>System face to face trainings. New system rollouts System updates System Training refreshers</td>
<td>0-6 weeks for 1 hour module</td>
<td>• AuthorIt + Captivate • Captivate Hosted on e-Campus or Intranet.</td>
</tr>
<tr>
<td>Information Modules</td>
<td>e-Learning module consisting of mainly concepts and theory. Low to medium interactivity – can include case studies and other clickable activities.</td>
<td>Policy rollout Procedure rollout or update</td>
<td>0-8 weeks for 1 hr module</td>
<td>• AuthorIt • Captivate Hosted on e-Campus or Intranet.</td>
</tr>
<tr>
<td>Webcast / Webmeeting</td>
<td>Live: synchronous meeting held over the internet using file sharing, phone and video. Recorded: Recording of a video or</td>
<td>Message broadcasts Product info – Release note Product/service updates</td>
<td></td>
<td>Microsoft Live Meeting</td>
</tr>
</tbody>
</table>
This document serves as a guide as to what types of deliverables we can create.

## Delivery/ Development Matrix

<table>
<thead>
<tr>
<th>Deliverable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>voice message using web cast software and delivered as podcast or vidcast</td>
<td></td>
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</tbody>
</table>

### Determine the objectives

<table>
<thead>
<tr>
<th>Objective</th>
<th>Deliverable</th>
</tr>
</thead>
<tbody>
<tr>
<td>know/recall/recognize</td>
<td>Scenario based e-learning with knowledge test</td>
</tr>
<tr>
<td>understand/explain/interpret</td>
<td>Scenario based e-learning with knowledge test</td>
</tr>
<tr>
<td>apply/produce/demonstrate</td>
<td>Interactive simulation based e-Learning with skills assessment.</td>
</tr>
<tr>
<td>The goal of the training is to realise an attitude change</td>
<td>Other forms are more appropriate. E-learning can only be used as additional support.</td>
</tr>
</tbody>
</table>
This document outlines your proposed solution to the training issue.

Introduction

To address the training issues we offer the following options:

- **Current situation:**

  Proposal:

- **What is needed:**
  - 

  Resources required:
  
  - 
  - 
  - 

Future Actions
This document is optional and can be used to present a comprehensive outline of the problem, analysis and proposed solution.
## Document History

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Author</th>
<th>Summary of changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.10</td>
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<td>1.3</td>
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<td>1.4</td>
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<tr>
<td>1.5</td>
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</tbody>
</table>
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  1.1 Summary ...................................................................................................................................................................... 1

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  2.2 <Area 2> ..................................................................................................................................................................... 2
  2.3 <Area 3> ..................................................................................................................................................................... 2

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1 INTRODUCTION

1.1 Summary
2 AREAS BEING ADDRESSED – PROBLEM ANALYSIS

Based on the information gathered there are <> key areas that need to be addressed through this proposed Training Plan.

2.1 <Area 1>

2.2 <Area 2>

2.3 <Area 3>
3 DELIVERABLES - RECOMMENDED ACTIONS

3.1 <Action 1>

3.2 <Action 2>

3.3 <Action 3>
4 MAPPING OF OBJECTIVES TO DELIVERABLES

Below are the identified learning objectives that will be addressed through the <> Training Plan. Each objective will be met by one or more training plan deliverables.

Please note that the schedule for development of these deliverables is yet to be confirmed.

<table>
<thead>
<tr>
<th>Objective</th>
<th>Deliverable 1</th>
<th>Deliverable 2</th>
<th>Deliverable 3</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>
TIMELINE FOR DELIVERABLES
6 SUCCESS FACTORS

6.1 Future Actions Needed

6.2 Critical Success Factors

6.3 Roles and Responsibilities

The following individuals are responsible for the key roles for this project:

For example:

<table>
<thead>
<tr>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Manager</td>
</tr>
<tr>
<td>e-Learning Developer</td>
</tr>
<tr>
<td>Technical Author(s)</td>
</tr>
<tr>
<td>Subject Matter Expert(s)</td>
</tr>
<tr>
<td>Implementation Manager</td>
</tr>
</tbody>
</table>
This document should be used to document the scope and responsibilities of the e-learning project. It will form the basis of your project plan and storyboard.
e-Learning Documentation Plan

**Approval**

<table>
<thead>
<tr>
<th>Name</th>
<th>Function</th>
<th>A</th>
<th>I</th>
<th>Signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Project Manager</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Implementation Manager</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Analyst(s)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Technical Communications QA</td>
<td></td>
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</tr>
</tbody>
</table>

A = Approval I = Information

**Project Information**

This documentation plan describes the e-Learning product intent, overall design considerations, breakdown of deliverables and overall project management considerations.

The responsible Technical Authors complete the deliverables in consultation with the Lead Implementation Manager for the module and the Project Manager. It requires sign off by the Project Manager, Lead Implementation Manager and Technical Communications QA.

**Project Details Roles and Responsibilities**

<table>
<thead>
<tr>
<th>Module</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Module Version</td>
<td></td>
</tr>
<tr>
<td>Sponsor</td>
<td></td>
</tr>
<tr>
<td>Owner</td>
<td></td>
</tr>
<tr>
<td>Technical Author</td>
<td></td>
</tr>
<tr>
<td>Issue date</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
</tr>
<tr>
<td>Confidentiality</td>
<td></td>
</tr>
</tbody>
</table>
e-Learning Product Intent and Overall Design Considerations

Scope of e-Learning Module

The e-Learning module is designed to achieve the following business outcomes:

The learning objectives are:

Audience and Distribution

The audience (Aud) for the e-Learning module is:

The distribution method is:
   - Email notification from <>
   - Listing on the <>
   - News item on <>
   - Upload to e-Campus
   - Upload to LMS

Product Context Diagram

The Product Context Diagram outlines individuals, organizations and systems that will interact with the e-Learning module
IT Infrastructure Requirements
The hosting requirements and other hardware requirements for this module are:

Authoring Tools
The authoring tools used for this project are:

Web Browser Compatibility Requirements
The browser types, versions and plug-ins requirements are:

Tracking Requirements
The bookmarking, scoring or user access tracking requirements are:

On-going Support
The update requirements moving forward and maintenance plans include:
e-Learning Deliverables

**e-Learning module structure**
The high level overview of topics and assessments to be included are:

**Content Mapping**
The learning objectives and activities and how they map to content elements are:

**Media content**
The media contents to be included in the e-Learning module (simulations, demos, audio, graphics)

**Testing Script**
The high level testing script including navigation, links, user volume etc is:

**Navigation Rules**
The outline of user profiles required and navigation/branching requirements are:

**Multilingual text**
When local language versions of e-Learning deliverables are required, they are prepared by a translation vendor and reviewed and approved by local business subject matter experts. In these instances a new project is established.

The following steps are required:

**Localization Information**
The current e-Learning module will be available in < >, < >
Other language versions may be added in a future release.
Overall Project Management

Roles and responsibilities

The following individuals are responsible for the key roles for this project:

<table>
<thead>
<tr>
<th>Role</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Manager</td>
<td>PM</td>
</tr>
<tr>
<td>e-Learning Developer</td>
<td>eLD</td>
</tr>
<tr>
<td>Technical Author(s)</td>
<td>TA</td>
</tr>
<tr>
<td>Subject Matter Expert(s)</td>
<td>SME</td>
</tr>
<tr>
<td>Implementation Manager</td>
<td>IM</td>
</tr>
</tbody>
</table>

Priority Matrix

To ensure that e-Learning quality is adequate for the release, we have prioritized:

<table>
<thead>
<tr>
<th>Measurement</th>
<th>1</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cost</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quality</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Risk Matrix

The following risks have been identified:

<table>
<thead>
<tr>
<th>Risk</th>
<th>Likelihood</th>
<th>Impact</th>
<th>Mitigation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Schedule

Source Materials Schedule
The following source materials are required:

<table>
<thead>
<tr>
<th>What</th>
<th>Who</th>
<th>When</th>
</tr>
</thead>
<tbody>
<tr>
<td>Functional Design (FD/FS) documents</td>
<td>PM</td>
<td></td>
</tr>
<tr>
<td>Training Needs Analysis completed by SME</td>
<td>SME</td>
<td></td>
</tr>
<tr>
<td>Existing training documentation used by &lt;&gt;</td>
<td>PM</td>
<td></td>
</tr>
<tr>
<td>Documentation Plan (for existing OLH etc)</td>
<td>PM</td>
<td></td>
</tr>
<tr>
<td>Change Requests</td>
<td>PM</td>
<td></td>
</tr>
<tr>
<td>List of new features</td>
<td>PM</td>
<td></td>
</tr>
</tbody>
</table>

Documentation Schedule
The schedule for the e-Learning deliverables is:

<table>
<thead>
<tr>
<th>Event</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>SMART Learning objectives</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Storyboard</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prototype 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Final e-Learning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Promotion materials</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
This template is optional and should be used when working with SME’s to determine key content areas and how performance is measured.

Key Task Breakdown
<table>
<thead>
<tr>
<th>Key Outputs</th>
<th>Key Tasks</th>
<th>Roles / Responsibilities</th>
<th>Typical Performance Gaps</th>
<th>Probable Gap Cause</th>
<th>Deficiency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Describes what is produced from doing the job tasks and identifies key performance measures of each output</td>
<td>Describes the key activities needed to produce the outputs</td>
<td>Clarifies who is typically responsible for performing the tasks</td>
<td>Identifies any typical ways the output or task does not meet performance standards</td>
<td>Identifies most likely causes for each typical performance issue/deficiency</td>
<td>E=environment K= knowledge/skill I=individual</td>
</tr>
</tbody>
</table>

Notes:
This template should be used for all projects.

<table>
<thead>
<tr>
<th>Task</th>
<th>Start</th>
<th>End</th>
<th>Days Complete</th>
<th>Days Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Initiation</strong></td>
<td>10/3/09</td>
<td>12/3/09</td>
<td>4</td>
<td>50%</td>
</tr>
<tr>
<td>1.1 SME to complete Intake Worksheet</td>
<td>10/3/09</td>
<td>10/3/09</td>
<td>1</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Create e-Learning Documentation Plan</strong></td>
<td>11/3/09</td>
<td>12/3/09</td>
<td>2</td>
<td>0%</td>
</tr>
<tr>
<td>2.1 Sign Off from key stakeholders</td>
<td>11/3/09</td>
<td>11/3/09</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>Create Project Plan</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.1 Sign Off from key stakeholders</td>
<td>12/3/09</td>
<td>12/3/09</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Date</td>
<td>Days Complete</td>
<td>Days Remaining</td>
<td></td>
<td></td>
</tr>
<tr>
<td>---------</td>
<td>---------------</td>
<td>----------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>09/03/09</td>
<td>0</td>
<td>23</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16/03/09</td>
<td>0</td>
<td>16</td>
<td></td>
<td></td>
</tr>
<tr>
<td>23/03/09</td>
<td>0</td>
<td>9</td>
<td></td>
<td></td>
</tr>
<tr>
<td>30/03/09</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>04/04/09</td>
<td>0</td>
<td>25</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11/04/09</td>
<td>0</td>
<td>18</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18/04/09</td>
<td>0</td>
<td>11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25/04/09</td>
<td>0</td>
<td>8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/05/09</td>
<td>0</td>
<td>24</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13/05/09</td>
<td>0</td>
<td>17</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20/05/09</td>
<td>0</td>
<td>10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>27/05/09</td>
<td>0</td>
<td>7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>01/06/09</td>
<td>0</td>
<td>21</td>
<td></td>
<td></td>
</tr>
<tr>
<td>08/06/09</td>
<td>0</td>
<td>14</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15/06/09</td>
<td>0</td>
<td>7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>22/06/09</td>
<td>0</td>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>29/06/09</td>
<td>0</td>
<td>1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
This document should be used for all projects. It outlines the flow, detailed structure and functionality of your e-learning.

---

e-Learning Storyboard
# e-Learning Storyboard

## Approval

<table>
<thead>
<tr>
<th>Name</th>
<th>Function</th>
<th>A</th>
<th>I</th>
<th>Signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Project Manager</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Implementation Manager</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Analyst(s)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technical Communications QA</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

A = Approval I = Information

## Project Information

This storyboard provides an overview of the content and structure of proposed e-learning lesson.

## Project Details Roles and Responsibilities

<table>
<thead>
<tr>
<th>Module</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Module Version</td>
<td></td>
</tr>
<tr>
<td>Sponsor</td>
<td></td>
</tr>
<tr>
<td>Owner</td>
<td></td>
</tr>
<tr>
<td>Technical Author</td>
<td></td>
</tr>
<tr>
<td>Issue date</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
</tr>
<tr>
<td>Confidentiality</td>
<td></td>
</tr>
</tbody>
</table>
Overall course structure

Insert diagram of overall course structure – screens and where they navigate to and level of interactivity.
<table>
<thead>
<tr>
<th>Topic Name:</th>
<th>Topic No.:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screen:</td>
<td>Screen ID:</td>
</tr>
</tbody>
</table>

<Insert screenshot of screen or description of what appears on screen or steps carried out in screen>

Overall goal of screen:

What should the learner do on this screen:

<table>
<thead>
<tr>
<th>Graphic files used:</th>
<th>Audio files used:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Graphic notes:</td>
<td></td>
</tr>
</tbody>
</table>

Interactions used:

Correct feedback pop up text: If correct branch to:

Incorrect feedback pop up text: If incorrect branch to:

Back: Forward:
<table>
<thead>
<tr>
<th>Topic Name:</th>
<th>Topic No.:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screen:</td>
<td>Screen ID:</td>
</tr>
</tbody>
</table>

<Insert screenshot of screen or description of what appears on screen or steps carried out in screen>

<table>
<thead>
<tr>
<th>Overall goal of screen:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>What should the learner do on this screen:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Graphic files used:</th>
<th>Audio files used:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Graphic notes:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Interactions used:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Correct feedback pop up text:</th>
<th>If correct branch to:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Incorrect feedback pop up text:</th>
<th>If incorrect branch to:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Back:</th>
<th>Forward:</th>
</tr>
</thead>
</table>
This template is optional and can be used with SME’s to document exact steps and data needed for Cp demos

Captivate Demo / Scenario Requirements

The following checklist outlines the requirements needed to create demos in Captivate. Each requirement must be checked off before starting production. For more information please see the <Documentation Plan / Storyboard / Other document>.

Tasks to be carried out in demo:

<table>
<thead>
<tr>
<th>Module</th>
<th>Task</th>
<th>Key outcome</th>
<th>Data needed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Scenarios:

Please provide 2 scenarios for each topic (contextual information, case study, example of what the context is when the user carries out the above tasks). These scenarios give background information as to why the user is required to do something or apply the knowledge acquired in the training.

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
In order to carry out the above tasks and create demos we need:

| Sample company 1:         | □ |
| Sample ID 1:              | □ |
| Sample company 2:         | □ |
| Sample ID 2:              | □ |
| Organisation 1 and 2      | □ |
| in FAT and UAT            | □ |
| Required data / situation at start | □ |
This document is optional and can be used to gather feedback from users and test pilot groups.

**Guidelines for evaluating eLearning lessons**

Lesson title: <...>

Questions*

*There is no need to check the language quality; that's taken care of by <>.*

<table>
<thead>
<tr>
<th>Number</th>
<th>Question</th>
<th>Yes / No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Does the lesson fulfill the goals set in the Welcome topic, specifically:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• &lt;...&gt;</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• &lt;...&gt;</td>
<td></td>
</tr>
<tr>
<td></td>
<td><em>If you answer this question with No, please use the Comments section below to enter your comments.</em></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Does the lesson provide information about &lt;......&gt; that you and your colleagues can apply in your daily work? <em>If you answer this question with No, please use the Comments section below to enter your comments.</em></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Are the examples easy to understand? <em>If you answer this question with No, please use the Comments section below to enter your comments.</em></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Are the examples relevant? <em>If you answer this question with No, please use the Comments section below to enter your comments.</em>..</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Are there enough examples? <em>If you answer this question with No, please use the Comments section below to enter your comments.</em></td>
<td></td>
</tr>
</tbody>
</table>
6. Is there anything else you’d like to see added in this lesson? *If you answer this question with Yes, please use the Comments section below to enter your comments.*

7. Is there enough information on each screen (not too little and not too much)?

8. Is it easy to navigate through the course (easy to start, find your way to different topics and exit)?

**Additional comments**

Please enter additional comments here. If you have specific comments, please print the page from the eLearning lesson and add your comments on the page.
SME Review Checklist

The following checklist provides a guide as to what you should be reviewing as an SME.

Please review the following:

<table>
<thead>
<tr>
<th>Key outcome</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are the instructions for completing the course clear?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is it clear to the learner what they will learn in the course?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are the video demos correct? (they demo the correct steps/procedure and display the correct settings, environment etc)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are the video demos placed in the correct location throughout the course?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are the video simulations correct? (they test the correct steps/procedure and display the correct settings, environment etc)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are the video simulations placed in the correct location throughout the course?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is the content relevant to the target audience?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are the examples or practice scenarios realistic and representative of day-to-day situations?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is there enough information to absorb on each screen (not too little and not too much)?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do the graphics enhance, not detract, from the content on each screen?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is it easy to navigate through the course?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
This template is optional and can be sent to SME’s to guide them in reviewing your e-learning project.

Additional comments: