

E-learning Vendor Management Checklist

June 2008

Permission is granted to print freely, unmodified, this document from www.doingelearning.com or to copy it in electronic form. If linked to from the net or web, link to www.doingelearning.com rather than host yourself.

Thanks!

<p>Stage →</p> <p>Core Area ↓</p>	<p>Engagement plan (what you need before you start)</p>	<p>Definition (clarifying your needs and solution design)</p>	<p>Development (turning vision into reality)</p>
<p>Communications</p>	<p>Have you ensured that there is a specific kick off meeting scheduled, with a clear agenda?</p> <p>Have you identified all team members who should attend the kick-off meeting from your organisation to extract maximum benefit?</p> <p>Have you ensured you have read all documentation or any proposed treatment from the vendor, and any other information supplied in advance?</p> <p>Have you ensured that all members of your team are briefed and prepared?</p>	<p>Have you asked your vendor how they will manage communications with:</p> <ul style="list-style-type: none"> • you • the Subject Matter Expert (SME) • other stakeholders <p>Have you received a clear outline of 'what next' and how progress will be reported?</p> <p>Have you clarified with the vendor who your key points of contact are, and how communication lines should work during the project?</p> <p>Have you informed your vendor about the best ways of communicating with you?</p>	<p>Have you factored in regular (weekly/fortnightly) communication and prompt flagging of issues arising?</p> <p>Have you put together a risk management table that you refer to throughout the project?</p> <p>Have you got effective communications between your own and your vendor's technology teams?</p> <p>Have you begun to consider how you will market the e-learning to your learners?</p>
<p>Stakeholders</p>	<p>Have you identified key stakeholders?</p> <ul style="list-style-type: none"> • Learners • Subject Matter Expert (SME) • Sponsor (person who pays) • Branding (for look & feel) • Technology • Do you need to consider a <i>project board</i>? <p>Have you drawn up a stakeholder map to manage and plan for your stakeholder engagement?</p> <p>Do you know your learners' needs - or is this a task you have commissioned your vendor to do? (Consider needs analysis, gap analysis, learning objectives, focus groups.)</p> <p>Do you have any 3rd party relationships (SMEs, video company, etc.)? If so, who is to handle/ manage this relationship - you or the vendor?</p>	<p>Have you and the vendor discussed what meetings need to occur and with which stakeholders?</p> <p>Have you been clear with the vendor about any pressures you face and the type of support you need from the vendor to 'look good' in your organisation?</p>	<p>Are you keeping all your stakeholders in a regular loop right from the start even if you won't be requiring their input until further down the line?</p> <p>Have you briefed your stakeholders where necessary/ appropriate?</p>

Stage → Core Area ↓	Engagement plan (what you need before you start)	Definition (clarifying your needs and solution design)	Development (turning vision into reality)
Benefits & Strategic opportunities	<p>Is your organisation in a position to support the needed learner time/ space/ potential cultural issues with e-learning?</p> <p>Are you clear on the business benefits the e-learning project will deliver?</p> <p>Are you clear that e-learning will deliver benefits on this project?</p> <p>Have you assessed or at least acquired the learner needs to be addressed by the project?</p> <p>Have you sold the benefits of working on this project to your team members? (e.g. being seen as an e-learning champion, freeing up their time in the future, something different, etc.)</p> <p>Is there an opportunity to think strategically about this project?</p>	<p>Has your vendor offered to support you personally through the project?</p> <p>Has your vendor offered to provide additional support if this is your first e-learning project?</p> <p>Has your vendor advised you of additional benefits to the original proposition/ solution?</p> <p>Are any benefits to be gained (learner or business related) and to be considered at this stage?</p> <p>Has the vendor offered any 'added value' as part of their service? (e.g.s white papers, demos of other programs, industry news, reuse, etc.)</p> <p>Have you made the vendor aware of potential benefits to them if they complete satisfactorily? (e.g. repeat business.)</p>	<p>Has the vendor offered to support you in this stage? (e.g. any presentations or marketing of your e-learning.)</p> <p>Have you identified any potential additional benefits at this stage?</p>
Schedule	<p>Have you identified your final delivery date?</p> <p>Do you understand the reason for the driver behind the end delivery date, and is this potentially flexible?</p> <p>Who are key individuals who could stop the project if they were ill or away?</p> <p>Have you added contingency?</p>	<p>Have you factored in the 'people risks'? (i.e. staff availability, time it takes for SME(s) to review, etc.)</p> <p>Do you have a clear schedule?</p>	<p>Are you monitoring schedule against deliverables, and mapping this to your team's availability - which may change?</p> <p>Are you ensuring that your vendor is finding solutions to maintain deliverable dates?</p> <p>Is your vendor looking for solutions/options to keep your project on schedule where necessary?</p> <p>Are you ensuring your SME or other relevant stakeholders are executing their tasks at speed and as per their diary?</p> <p>Are you managing sign-offs?</p> <p>Do you have a project plan that allows for flexibility?</p> <p>Do you have a Plan B?</p>

<p>Stage →</p> <p>Core Area ↓</p>	<p>Engagement plan (what you need before you start)</p>	<p>Definition (clarifying your needs and solution design)</p>	<p>Development (turning vision into reality)</p>
<p>Team (resources)</p>	<p>Are you clear on how involved you want/ need to be with the project?</p> <p>Have you identified your team? (Normally at least SME, and other specialists.)</p> <p>Are you clear on how much time will likely be required from each member on the project?</p> <p>Have members of your team sufficient availability to deliver on their tasks on the project?</p> <p>Have you clarified/ provided comfort to your team in areas that will be new to them as it is e-learning.</p> <p>Have you briefed your team on their roles and responsibilities? e.g.</p> <ul style="list-style-type: none"> • SME: involvement and 'fidelity' of project • Do they understand version control? And impact of non-adherence? <p>Have you or your team worked on e-learning projects before?</p> <p>Have you the optimum number of SMEs for your project?</p>	<p>Have you reconfirmed with your team their roles and responsibilities?</p> <p>Have you reconfirmed time commitments?</p> <p>Have you checked that any additional team members/ resources will be available following initial discussions with vendor?</p> <p>Have you taken into account the expertise of the vendor (learning, technology, etc.) and your SME? N.B. Ensure the SME focuses mainly on content issues.</p> <p>Have you gained recent learners' experiences, rather than simply rely on 'expert' opinion on content?</p>	<p>Have you reconfirmed with your team their roles and responsibilities?</p> <p>Have you ensure that you or your team aren't stifling the expertise of your vendor?</p> <p>Have you planned how to manage the potential changing demands on your team as the project progresses? (e.g. different amounts of time/ additional resources.)</p>
<p>Budget</p>	<p>Have you any financial contingency in place?</p> <p>Have you acquired the authority to approve additional budget?</p> <p>Do you understand the basis of your budget: fixed price, time and materials, or simply a ball park figure to date?</p> <p>Is the payment schedule fair or balanced in your favour? (i.e. back loaded so payments are made at later stages.)</p> <p>Are payments based on deliveries or sign-offs? (Sign-offs work in your favour.)</p>	<p>Have you clarified the budget situation with your vendor? (Ensure the vendor is aware that budget change will only occur if agreed scope change occurs driven by you.)</p> <p>Have you agreed an acceptable payment schedule?</p> <p>Is your vendor proposing solutions (when needed) to fit within the agreed budget?</p> <p>Is your vendor aware of the priorities of your scope drivers (Schedule/ Quality/ Cost)?</p> <p>Have you and the vendor clarified how any Change Control with budget implications will be managed?</p>	<p>Have you gained a full and comprehensive breakdown from your vendor for any additional costs associated with, for example, change requests or additional services?</p>

<p>Stage →</p> <p>Core Area ↓</p>	<p>Engagement plan (what you need before you start)</p>	<p>Definition (clarifying your needs and solution design)</p>	<p>Development (turning vision into reality)</p>
<p>Quality/ Review</p>	<p>Do you have an SLA in place?</p> <p>Have you ensured that you have your own internal comprehensive testing stage?</p> <p>Have you considered using Focus groups to ensure learner needs are met?</p> <p>Are you clear on the business goals and learner objectives?</p> <p>Have you considered the demands on your time and on other resources that will need to be involved in reviewing/ testing at each stage?</p> <p>Have you considered stakeholders who will potentially want to see the solution at specific stages? (Do not ignore this as this could come back and result in late out of scope changes.)</p>	<p>Are you confident in the effectiveness of the proposed solution?</p> <p>Have you considered that the e-learning solution needs to be, among other things:</p> <ul style="list-style-type: none"> • Engaging • Memorable • Motivational • Rooted in the 'real' world • Fun - if possible! • Less formal, more personable <p>Have you considered use of appropriate corporate branding and style guides, but not to the detriment of learning?</p> <p>Have you ensured the solution satisfies all stakeholders? (The learners, SMEs, board, etc.)</p>	<p>Have you obtained the necessary resources to cover <i>in situ</i> testing, and technology integration?</p> <p>Have you briefed your team effectively on what they can/ cannot change at this stage?</p> <p>Have you ensured you have an effective review form? (Request support here from your vendor.)</p> <p>Have you considered a Pilot group - comprising a sample of the target audience - to assess the efficacy of the final solution?</p>

Stage → Core Area ↓	Engagement plan (what you need before you start)	Definition (clarifying your needs and solution design)	Development (turning vision into reality)
<p>Scope</p>	<p>Do you understand the components that define scope for an e-learning project? e.g.s</p> <ul style="list-style-type: none"> • Developed hours vs. learner hours (duration) • Number of screens • Media mix (graphics, photography, audio, animations, video) • Branching learner paths • Diagnostic/ Assessment • Level of interactivity • Accessibility • Localisation <p>Have you considered what the most important driver is for this project: Time/ Cost/ Quality - which order?</p> <p>Have you assigned team members to the appropriate areas to manage? (e.g.s SMEs on content and context; marketing on branding; you ultimately ensure successful delivery and effective LEARNING.)</p> <p>Have you checked out - as best as you can - what are the specific requirements for your e-learning project? (e.g.s accessibility, localisation, etc.)</p> <p>Have you consulted or asked your vendor to provide you details on items that may affect scope for you to check against your specification?</p>	<p>Have you an acceptable Change Control process in place with your vendor?</p> <p>Have you clarified your role and depth of involvement in the project with the vendor?</p> <p>Are you defining scope on the same page as your vendor (number of screens, media mix, interactivity, etc.)?</p> <p>Have you finalised and agreed scope? (Ideally within a sign off specification.)</p> <p>Have you checked that the SME hasn't gone into reams of detail - which WILL be forgotten by learners, and charged for by vendors? (A good vendor will try to stop this and raise it with you, but you must support as appropriate if you have authority over the SME.)</p> <p>Have you clearly communicated to your vendor any special requirement and had this documented? (e.g. accessibility.)</p> <p>Have you clearly agreed design? (Instructional approach, interactivity, media mix, etc.)</p> <p>Have you explored the 80:20 rule with your SME around content?</p>	<p>Have you got in place an effective process to monitor scope?</p> <p>Are you advised by your vendor when a scope issue appears so that you can take appropriate action?</p> <p>Are you monitoring your SME(s)?</p> <p>Ensure you manage your vendor if they try to 'up sell' - ask yourself: 'does this add bottom line value'?</p> <p>Do you have the right people in place to get the job done well first time? (Multiple-reviews add time and scope issues. Best to get THE expert who can be succinct and authoritative.)</p>
<p>Risks ('uh-oh' moments!)</p>	<p>Have all issues associated with e-learning procurement been considered and resolved at this stage?</p> <p>Are you 'sitting on things'? (Execute at speed once procured.)</p> <p>Are you in a position of readiness?</p> <p>Is there a contract/ Non Disclosure Agreement (NDA) in place?</p>	<p>Have you followed your organisation's processes and practices in engaging with the vendor?</p> <p>Are you happy with the kick-off, with an agreed methodology, and approved project initiation documentation? (e.g. PID, SOW, schedule, etc.)</p> <p>Have you covered any other risk that presents itself in the appropriate core areas?</p>	<p>Have you considered IPR?</p> <p>Have you covered any other risk that presents itself in the appropriate core area?</p> <p>Have you communicated appropriately within your organisation any risks that affect things outside of this project?</p> <p>Have you investigated if any other stakeholder could emerge from out of nowhere?</p>