



Live and Learn

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Writing an E-Learning RFP

The Role of Interactivity, Media, and Context-Dependency

By Gus Prestera, PhD, CPT – President, effectPerformance, Inc.

Some of you have told me that when pricing custom e-learning courseware from vendors, it can be difficult to make good comparisons. Not all e-learning courses are created equal. By its nature, designing custom courseware involves a great many variables, requiring various assumptions to be made. Each vendor has different costing and pricing methods. The result is that regardless of how well your Request for Proposal (RFP) is written, comparing proposals may sometimes be like comparing apples and oranges.

One way to address this is to include in your RFP a common framework for classifying and pricing different types of e-learning. This way, all of the vendors are pricing their services in a way that helps you make fair comparisons.

One framework commonly used in the industry ranks e-learning according to three levels:

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- **Level 1** – Page-turner with simple navigation but with little interactivity
- **Level 2** – Page-turner with moderate interactivity such as reinforcement exercises and quizzes with scoring and feedback
- **Level 3** – Simulation or other high-end course with dynamic branching and robust interactivity



Media Considerations

This 3-level model is okay but may be too high-level for your needs. Media elements like graphics, animations, illustrations, audio, and video can add aesthetic value to a course, but they also impact the pricing. An alternative to the 3-level framework was taught to me by my friend and colleague Ty Johnson and involves a 3 x 3 matrix that separates media from interactivity considerations (see table on page 2).

Note that as one moves from a simple 1 x 1 e-learning course—really no more than a simple page-turner with basic graphics—towards the bottom right of the table, the complexity, length, and pricing of the project increase. More robust interactivity requires more programming and testing, just as more advanced media production requires more media and quality assurance resources. In your RFP, you could include a table like this and then request pricing for any of the nine combinations or for all of them.

One advantage of the matrix is that it helps us consider the full array of possibilities for our e-learning product. One of the most common types of e-learning developed today is the 2 x 2 course. However, note that it is possible to develop a 1 x 3 simulation using simple text and media. Because we are giving up some media richness (the glitz factor) for greater interactivity, the cost can be equivalent to a 2 x 2 course. Yet in a situation where the instructional goal targets higher level thinking skills, the increased interactivity may be more important than the glitz.

But What About Process?

One disadvantage of the 3 x 3 matrix

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Media x Interactivity e-Learning Matrix

		Media		
		Level 1	Level 2	Level 3
Interactivity	Level 1 Include the most basic of learner interactivity, such as a menu and linear back/next navigation. These kinds of courses can consist of static web pages or downloadable documents	Typically consist of only the most basic media, such as text, stock clip-art, and stock photos	Level 1 plus mid-range media such as customized graphics and stock photos, simple 2-D animations, and custom voice-over narration	Level 2 plus high-end media, such as custom video, 3-D animations, and custom illustrations
	Level 2 Include higher levels of interactivity, such as hyperlinks and hypermedia that make the course less linear, embedded practice exercises and learning checks with feedback, and posttests	1 x 1	2 x 1	3 x 1
	Level 3 Are often non-linear, allowing for branching by learner needs, exploration strategies, branching exercises, and full-scale simulations	1 x 2	2 x 2	3 x 2
		1 x 3	2 x 3	3 x 3

is that it focuses only on product-related considerations. While interactivity and media are important cost drivers, process-related issues should also be considered, because lengthy, inefficient, and/or ineffective processes can be costly as well. Some processes are very efficient but yield less effective courses, and some processes may be more effective but are too inefficient to be feasible. It is important to strike a balance to reach the quality level we desire for the budget and timeline we can afford.

Context Dependency

I find that the most important process driver, aside from the number and length of client reviews, is context dependency. As I've written about many times in *Live & Learn*, context-dependency is among the most important instructional design considerations that one can make. Before I discuss how context-dependency impacts project effort, duration, and pricing, please bear with me as I define context-dependency and its role in workplace learning.

When I use the term context, I refer to "the set of circumstances or facts that surround a particular event, situation, etc." (Webster's Dictionary, 1996). For training professionals, the relevant context is the workplace. In order for a course to be considered truly successful, learners must transfer what they have learned in the course to the workplace. Mountains of research point to the singular conclusion that in order to promote this transfer, learners must apply the concepts, facts, best practices, and procedures that they are learning in

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Direct Communication:

Facilitating Designer-SME Interaction

By Stacie Comolli, M.Ed.

effectPerformance Instructional Design Consultant

A few years back, I worked as an instructional designer on a project where many levels of hierarchy separated me from the client. All communication between my subject matter expert (SME) and me flowed through a project manager and salesperson from my organization, and then a Project manager on the client side. Needless to say, by the time the SME's reply hit my desk, the information was useless, because the question got distorted.

Since our salesperson and project manager wanted to be involved in all communication, we frequently set up conference calls for content gathering. This added a lot of time to the process, because with so many participants on every call, it

was difficult to get through the agenda. In the end, it was the learners that suffered, because the design did not naturally evolve to meet the expressed needs of the learners and the organization.

"...by the time the SME's reply hit my desk, the information was useless...."

A more direct communication strategy would have expedited the design process and generated a better experience for learners. For our next project together, we decided to try e-mail to communicate with each other. This way we could copy all interested

parties on our correspondence. I also offered to type notes from all meetings for interested parties. Everyone was aware of the project status and had the opportunity to offer their opinion, and more importantly – we were able to use our time more effectively to create a better learning solution.



**Certified
Performance
Technologist
(CPT)**

Gus Pretera, PhD, CPT

People often ask me what the CPT at the end of my name stands for. The Certified Performance Technologist is a designation awarded by The International Society for Performance Improvement (ISPI). It is performance-based rather than education-based, so CPTs must demonstrate

proficiency in ISPI's 10 Standards of Performance Technology primarily through actual performance improvement initiatives that are completed in ways that are consistent with ISPI's Code of Ethics. Individuals who receive the CPT designation must be re-certified every three years to maintain the credential. We re-certify by demonstrating recent performance improvement initiatives, presenting at industry conferences, and being active in the field of performance improvement. For more information, please visit www.ispi.org.



Authentic Storytelling

During new hire training at Nordstrom, a video shows a cashier recounting a day when a customer tried to return a car tire without a receipt. The founder of the company told the cashier to accept the return. "But sir," the cashier replied, "we don't sell tires." The founder responded, "I know." Nordstrom trainers use this story to springboard into discussions about the company's customer service philosophy.

Such forms of storytelling can be compelling, descriptive, and highly engaging for the learner. Authentic storytelling is our name for a design tactic that involves having real workers telling real stories about real workplace situations. These stories can describe challenges overcome, lessons learned, cultural nuances, company values, best practices, poor practices, and much more.

To incorporate authentic storytelling into your designs, you need to have good stories. As part of your analysis, talk to real workers and gather their stories. Even if you do not use them all in your course, they can provide valuable insight.

the course to realistic workplace situations.

How do we training professionals promote real-life application? Often, we use realistic examples and counter-examples, case-based questioning exercises, simulations, role-plays, and other context-*dependent* learning strategies. With context-dependent learning, practice and testing tend to be performance-based, rather than objective. Context-dependent design is highly customized to the needs of a particular target audience, and so is often not relevant to learners outside of that target audience (less re-usable).

By contrast, context-*independent* learning strategies present ideas, facts, rules, and high-level processes without taking contextual circumstances into account. In extreme examples, learners are left thinking to themselves, "That's great information, but what do I *do* with it?" Practice and reinforcement exercises reflect the abstract nature of the content, tend to be objective in nature, and are said to be widely applicable.

So what does context-dependency have to do with the complexity, length, and pricing of a custom courseware project? Well, just about everything. When context-dependency is *not* a concern, courses tend to be very easy to design and develop. Media might include some narration and simple animations, but highly complex and customized media would rarely be necessary. Since the course would primarily involve presenting facts, a simple page-turner would suffice or possibly a page-turner with simple reinforcement exercises and an objective test. The instructional

designer would spend relatively little time and effort, because—being fact-driven—the course content is simply compiled by interviewing subject matter experts (SMEs) and reading documentation.

Conversely, learning strategies that are highly context dependent are not easy to design and develop. In order to understand the workplace context, the

instructional designer cannot simply rely on documentation and SMEs; rather, she must:

- Get immersed in the workplace

- Talk to real workers
- Observe real work in progress
- Gather examples and non-examples
- Gather sample work products
- Analyze performance metrics and other sources to understand the issues and problems faced in the workplace

These activities take time and require expertise that is rarely found in novice instructional designers.

Another point to consider is that when context is an important factor, the designer naturally gravitates towards

context-dependent learning strategies. These tend to be performance-based and therefore drive demand for more advanced kinds of interactivity and more contextually realistic kinds of media. As a result of these process- and product-related considerations, the more context-dependent a learning experience you—the client—demand, the greater the effort, duration, and price of the course.

Therefore, be sure you consider context-dependency, interactivity, and media before assembling your RFP. Communicating a clear picture of what kind of course you desire will help your vendors estimate project effort, duration, and cost more accurately. Using a framework similar to the ones presented here, you may find it easier to make comparisons across different vendors.

"...the more context-dependent a learning experience you—the client—demand, the greater the effort, duration, and price..."

Parting Shot

Allan Kobernick, multimedia developer extraordinaire and effectPerformance associate, will be presenting at the May 4th meeting of the Great Valley chapter of the International Society for Performance Improvement. The title of his session is *Designing and Developing from a User's Perspective*. For details, visit <http://www.gvispi.org/>.

Be there or be square!



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