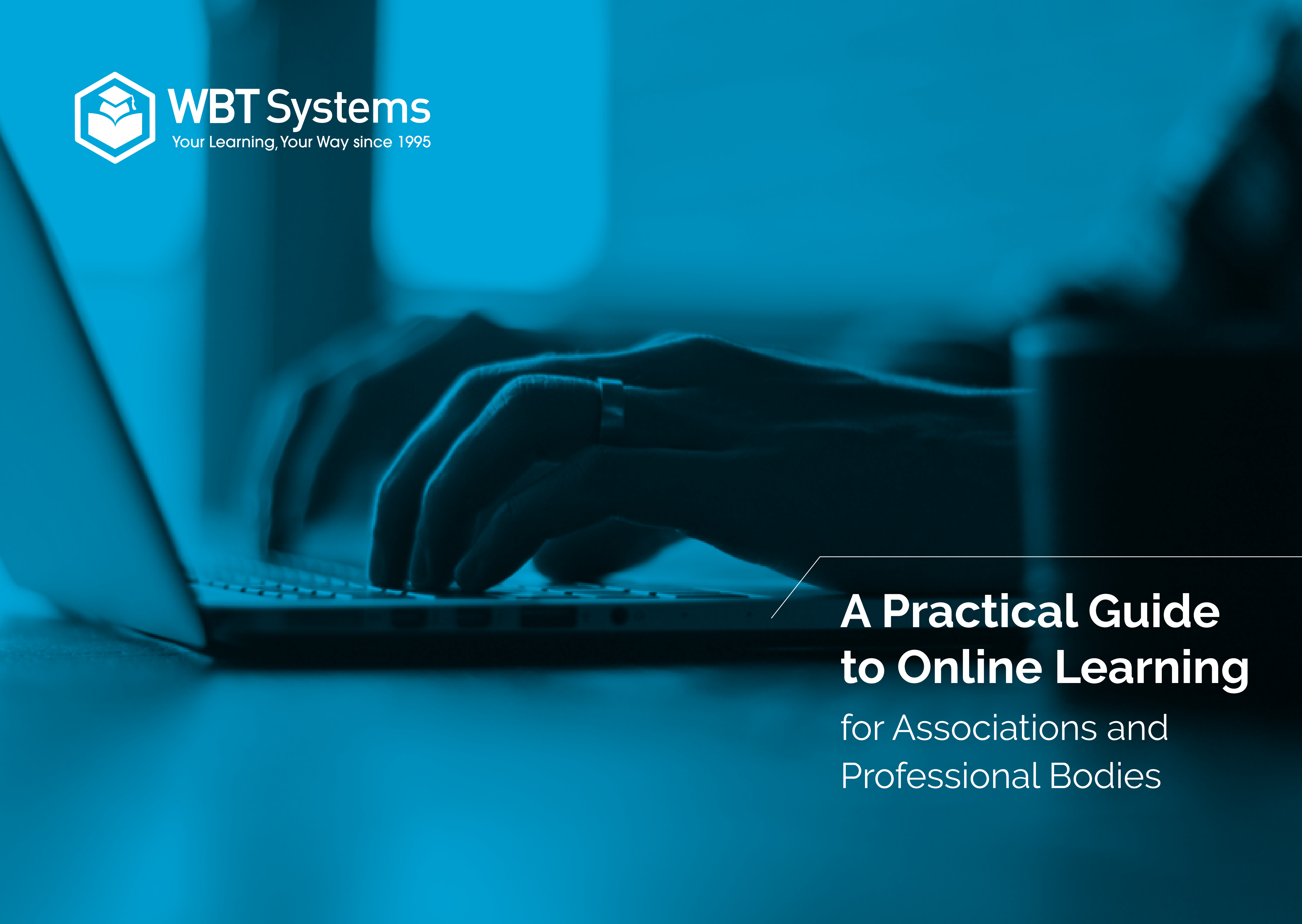

WBT Systems
Your Learning, Your Way since 1995

A Practical Guide to Online Learning

for Associations and Professional Bodies

With increasing unemployment levels, the need for re-skilling has never been more important.

Introduction

The economic downturn has forced many associations and professional bodies to examine their current business practices and look for ways to make improvements. One area which is increasingly coming under the microscope is member training and accreditation.

A growing number of associations are moving from the more traditional classroom-based training programmes to a blended learning approach, where online courses are introduced to complement or replace classroom sessions. This is not only being driven by the need to reduce the overall cost of training, but there is also increasing demand from members to make training more relevant and accessible. With increasing unemployment levels the need for re-skilling and retraining to find work, or hold on to an existing job, has never been more important.

Timing is a significant factor in this move to online learning. By and large the membership landscape has now reached web maturity and as we all regularly update our Twitter and Facebook accounts, there is a healthy appetite for online offerings even within traditionally non-technical sectors.

Associations are also realising that online learning and Continuing Professional Development (CPD) are good ways to improve member retention and in many cases can actually increase membership. Education and certification offerings can become a key differentiator as members look for more benefits from their annual subscription.

A comprehensive eLearning solution offers additional functionality, over and above the tracking and management of online courseware.

eLearning Systems

There are many eLearning systems available in the marketplace, which enable associations to take initial steps into online learning. In advance of offering full eLearning courseware that members can complete in their own time, some professional bodies take an interim step in this process and initially provide webinars and online "events".

The more comprehensive eLearning solutions have a considerable amount of additional functionality, over and above the tracking and management of online courseware. This can include:

- an online learning portal for members, where each member can access their own information in a secure environment. The portal is also seamlessly integrated with existing systems such as membership databases or financial systems, thus removing the need to re-key data
- categorisation of members, so that different groupings of members may be treated in a different way or may be offered alternate training programmes
- the ability to browse a catalogue of online courses, classroom events, seminars, books, CD's, etc. and purchase offerings with different pricing options: member and non-member fees, discount coupons, "bill me", credit card processing, etc.
- tracking of delegate attendance at seminars and events with automatic notifications so that members are sent details of course changes, updates, confirmation of enrolment, etc.
- online discussion forums, where members taking the same course can communicate with each other or with a course instructor and share information, and announcements that enable relevant course information to be sent out to selected groups of users
- ability for members to complete tests, exams and surveys online with various question types as well as the automatic management of skills and certificates, so for example if a member takes a course and passes a test, they are automatically awarded a certificate. This kind of functionality is appropriate for CPD tracking and management based on courses completed, tests taken, events attended and other relevant activities

The Benefits of eLearning

Enabling members to take courses and tests online can bring significant benefits not only for the association but also for members. These include:

- reduction in overhead costs associated with running traditional classroom training – there is no need to hire a location, pay for coffee, print materials, etc.
- online learning does not require members to travel and pay for daily living expenses
- less time is needed for mundane administration tasks such as booking conference rooms, scheduling instructors, printing / posting out certificates, etc., so that more time is available to develop meaningful online courseware that will add real value for members
- members have access to relevant information as and when they need it. Typically members can not only take courses in their own time, but the course material may be continually available online as a reference source
- information can be made available to members in a timely manner. If laws or practices change, new courseware can immediately be deployed enabling members to quickly update their knowledge

Selecting a Suitable System

The selection and implementation of a suitable learning system can be a daunting task for many associations. Requirements can range from simply rolling out a single course, through to the implementation of complex accreditation rules and regulations. Over the past few years, WBT has worked with many professional bodies to implement successful learning solutions and we are familiar with the challenges faced. Based on our experience, there are a number of key areas that need to be carefully considered by associations thinking of moving in the direction of online learning. The guidance we offer may help to minimise the risks involved and ease the overall implementation process.

Here are some tips...

Identify the Stakeholders

More often than not, the initial need for a learning system will come from the continuing education or training department within an association. Because of this, it is all too easy to focus the needs of the new system purely around the requirements of these particular units and overlook the involvement of IT, Marketing and Finance. When putting together a list of requirements for a new learning system, it is essential that all the relevant business units are included in the process.

While they may not have specific input into functionality requirements, the IT department will no doubt want a say in the technical architecture of the solution, which may include the development environment, database, supported browsers, hardware specifications and hosted versus non-hosted options. Not involving IT early in the process can lead to significant issues if the solution doesn't "fit" within the existing technology infrastructure and can also result in the IT department being unwilling or unable to support the solution, which hinders the chances of success.

The involvement of Finance should be considered not just from a monetary perspective but more importantly to ensure that the selected system correctly interacts with existing financial applications. With most eLearning implementations for associations requiring eCommerce functionality, details of financial transactions need to be correctly reported and accounted for.

There are a number of financial requirements that should be considered during the selection process, such as:

- product / general ledger codes
- discounts and coupons
- sales reports
- export of purchase details
- course cost information
- multi-currency (if required)
- member & non-member pricing options
- the sale of items that require the calculation of shipping and handling fees, e.g. books, CD's, DVD's.

There is a growing interest in attempting to increase revenues from the membership base and that's where Marketing has a key role to play. The competition for members' attention, their time and ultimately their money is intense, so it makes sense to include functionality within any new system that can support marketing activity and maximise the revenue potential. The involvement of the Marketing department is essential during the selection process and on their list of requirements will be items such as:

- professional portal branding
- positive member experience
- the ability to promote new product offerings
- cross-selling and up-selling of product offerings
- special offers and promotions
- member communications
- notifications
- measuring effectiveness of promotions

2

Understand Your Cost Options

Once a suitable learning solution has been selected, it is necessary to put a contract in place that suits the association's business model. Critical to this is to agree a payment structure that is in line with planned usage of the system.

Many software vendors use a traditional, up front payment per-user licensing module, which fits well within the corporate market where all employees can log into the system on a daily basis. Often this model is not suited to the needs of an association, which may have many thousands of members not all of which will access the system. Consider the case where association events are being set up, delegates may be registered and tracked centrally, but never actually use the system.

In many cases a "pay as you go" model may be preferable, where costs are calculated based on a usage report which is generated at set intervals. Key to this is to define the term "usage".

It may well be the case that there are multiple fee structures associated with different types of usage.

Examples of these would include:

- mirroring the fee structure of the association – if the association charges on a per-course basis, then software license fees may be paid on the same basis
- profit sharing, where the association agrees that a percentage of the fee paid by members will be paid to the provider
- "no-fee" options which might cover the management of social events within the system, where delegates do not pay a fee
- A set charge up front or per year, which allows unlimited member usage of the system

Factor in Support and Maintenance

At contracts stage, it is important to consider the on-going support and maintenance of the solution. Adequate service level agreements should be put in place so that technical support response times are acceptable and won't put the association's business at risk.

Costs are also a key factor, not only in terms of any applicable maintenance and support fees but also in terms of future expansion of the solution. As the system grows it is important to understand any limits on storage capacity or bandwidth usage, and what the financial implications are of increasing these limits.

It is also essential to determine the costs associated with adding or amending system functionality. No organisation's business stands still, it is constantly changing and evolving and all supporting systems should be flexible enough to cope with this change, at least for a period of three to five years. If custom development is required for each system enhancement, then it's likely that the cost of maintenance may rise over time.

4

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Get the Right Project Team in Place

Once the contract has been negotiated and signed off, the real work begins. The implementation project will require significant input from individuals within the association and this should not be underestimated.

First off, it is essential to consider the composition and size of the project team to adequately cope with the task in hand. The system provider should be able to make recommendations in this area, particularly relating to the skill sets required, likely timeframes where input will be needed, scope of the tasks, etc.

If too many people are involved in the implementation then it can be very difficult to make decisions and reach a consensus. Sign-off of documentation can take a lot longer and project meetings can be long drawn out events, where too many agendas are on the table to make real progress.

The flip side of this is where the project team is too small and one or two individuals are tasked with everything whilst still trying to carry out their day job. In this case turn-around times tend to increase due to lack of resources and there's also a risk of misguidance, as only limited opinions and feedback are available.

The ideal project team would typically be made up of three to five key business owners from relevant departments, one of whom takes on the role of project manager (on the association side). The project manager has to be prepared to dedicate a significant portion of their time to the implementation project. A project sponsor is also recommended, who understands the business benefits of a successful solution and who has authority to make decisions and effect change within the organisation.

Stay Focused!

In our experience many associations look at implementing a new learning system as part of a bigger more extensive IT restructuring exercise. This may include rolling out a new member management system, a redesign of the association website, a replacement content management system or an upgrade of the finance application, all at the same time. Effecting such change would be a significant challenge even for large organisations with many resources, but for associations whose staff are busy providing day-to-day services for members it can sometimes be a step too far. In this environment, a "big bang" system approach often leads to one or more of the projects being delayed or poorly implemented as resources are stretched too thin and there are timing conflicts.

If a full restructuring exercise is necessary then a phased approach should be taken, where lead times, resourcing, conflicts and interdependencies are fully considered.

6

The key stakeholders should put together a comprehensive set of requirements at the start of the project.

Beware of Scope Creep

A new learning system will impact various business units within an association. Individuals from each of these units will have their own specific requirements and will be keen to ensure that their needs are met. With this backdrop, all too often an association will go down the route of trying to implement the "perfect system", where new requirements from stakeholders are continually arising. From an internal perspective the easiest option is often to do nothing and let everyone have their say, but this can lead to significant issues during the project.

The downside is that if the requirements are continually changing and growing, then everything will take a lot longer. It can give rise to an endless cycle of change requests, code releases and re-testing, all of which come at a significant additional cost.

A preferable approach is to have all the stakeholders put together a comprehensive set of requirements at the start of the project. There can be a number of iterations of the requirements document but a deadline should be set for completion, after which no further changes are permitted. If the estimated delivery costs are too high, then management and the project sponsor may go through an exercise to reduce the initial level of functionality, but ultimately the result is a single specification document that should not change once signed off. With the requirements set in stone, a new system can be quickly developed and deployed to members.

The aim should be to provide a solution that meets most of the key user needs, as opposed to trying to deliver everything. In this way, when members start using the system they can provide feedback on possible new requirements, which can be implemented as a second or third phase of the project. Some customers have rolled out their learning solution and then followed up with an end-user survey a year later. Respondents provided feedback on the system together with suggestions as to additional features they would like to be included – these were built into a later phase.

Adopting such an approach ensures that members are closely involved in the evolution of the solution and that it is kept relevant for them. In turn, this typically promotes loyalty and increases overall usage of the system enabling higher revenues for the association from continuing education and professional development.

7

Linking to Existing Systems

With the implementation of a new system, typically one or more integrations with existing systems are required.

Most associations already have a member database or an Association Management System (AMS) which contains all of their membership data. Typically the new learning solution will be required to integrate in some way with such systems, but it is essential to decide which system will be the master. The master system is the definitive source of membership information – it is the main repository of membership data and it is assumed to have the most accurate, up-to-date details. In most cases it makes sense for the AMS to be the master system, but sometimes the learning solution is a more appropriate master data source – for example if there are limitations on the ability to customise the AMS to extract data, the AMS data is not of good quality or the existing AMS is going to be replaced.

Although a seemingly simple decision, this has a significant impact on how the system is designed.

Once the master system is determined, it is then a case of thinking through all the possible workflows and integration points with the new system. Links may be required to financial systems to record cost information or to an existing membership portal, where single-sign on will probably be required so that members who sign into the portal are not asked to login again when trying to access their learning.

It is essential to decide which system will be the 'master', or definitive source of membership information.

Don’t Forget the Launch

Our final recommendation is to make sure that all members know about the launch of the new system. Growing anticipation is a great way to ensure early adoption of the new solution.

Regular updates on progress should be sent out to members in e-newsletters and marketing campaigns, so that they feel part of the process and are ready for the launch. Any such circulations should be as “complete” as possible and not give rise to questions or concerns for members, otherwise it may result in a flood of calls to the switchboard.

For example stating that the new system will give rise to a change in the certification process for members should be accompanied by information on the exact dates for the change as well as links where members can find out more details.

In addition, giving the system a name like “Association Learning Academy” or “Member Learning Network” is a good way to create brand awareness and differentiate the offering. It may also be worth running a competition for members to name the new system or provide a prize for the first few members who log in.

Conclusion

For any association, a comprehensive learning solution can open up a whole new world of better member service, increased revenue streams and reduced administration overhead. Although there can be many pitfalls and potential issues, taking a structured approach and working with a proven provider can help to ensure success and greatly reduce costs. Having seen first-hand the benefits our customers have realised, we would encourage you to embrace online learning and ensure it is a key part of your future business strategy.

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