How to screen, evaluate,

and select an online education provider.

Table of Contents

Introduction. 1

How do you get started? 1

Who should be on your evaluation team? 2

What's the next step after the preliminary screening? 2

How to develop an online education RFP(Request For Proposal). 2

How to analyze your responses. 3

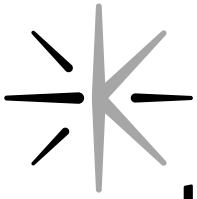
What's really important? 4

Cost/ROI. 4

Who should participate in the evaluation? 4

Where do you go from here? 4

Where should you go? 4



elementk

Introduction.

"A desire of knowledge is the natural feeling of mankind; and every human being, whose mind is not debauched, will be willing to give all that he has to get knowledge." †

The online, 24x7 availability of learning in virtually every area of human endeavor — from business management to advanced computer training has changed the way we, as trainers, approach our job.

Yet online education is no universal cure. For some, already comfortable with the Internet, it is a fabulous way to learn. For others, it may not completely replace the classroom experience. Online learning has its limitations as well as its significant advantages of low cost and universal accessibility. So like any new technology, its introduction to your firm should be carefully planned. And the provider you choose should be willing and able to help you integrate online training with your traditional approach.

For some firms, it's the advanced computer training that makes the program so valuable. In those firms, technical professionals love being able to advance their careers and acquire the professional certifications that allows them to be more valuable to you (and more marketable, by the way)—any time of day. They can gear the training to their schedules—and surprise, surprise, many of these people are night owls!

But for other firms, it's the omnipresent availability of the training that makes it so appealing. An account executive faced with a big presentation tomorrow can run through a PowerPoint tutorial tonight and learn what he/she needs to get the job done.

For still others, the management/business courses that add polish and professionalism to a skill set are the most valuable.

The set of criteria that you might demand in your online solution are probably very different from any other firm's standards. Therefore the first step in selecting the ideal online education partner is to understand what you want to get out of the partnership. Once you understand your own firm's needs, you can begin to define the requirements for your vendor.

How do you get started?

Once you've established your own criteria for an online partner, you are in a position to begin screening possible providers. This first step should be a preliminary screening designed to save you the unnecessary labor of looking at organizations that are long shots to get the business. You probably will want to rule out anyone who does not offer the complete array of courses you need for your organization's training. You might want to rule out anyone who has not been in business for more than two years — you want a vendor who is sufficiently established so you can talk to some of their long-time customers. You may want to set a lower limit on the number of online seats they have in use — say 250,000 seats, for example, would give you the assurance you'll be dealing with someone who is here to stay. But you also want to be comfortable that the provider you select has a critical mass in the course categories in which you are primarily interested. Make sure the sites you are considering are truly 24x7, and that online help is also available for any participating student 24x7 as well. Once you've narrowed down your list in this fashion, you'll want to go online yourself and check out the websites of anyone left on the list.

Most reputable organizations will allow you access, usually by providing a password to their site so you can view the website on your own time and at your own pace. Beware of anyone who refuses or doesn't allow you the freedom to move around the site as a student would. As you browse through their site, make notes on how easy it is to navigate the site, how quickly you move from one window to another, and how clear it is what the next step might be.

Along with the student site, you'll want to check out the administrative areas of their websites, to make sure that any requirements you might have in this area can be met. Is it easy to enroll a new student, to know what courses they are taking or to produce reports indicating progress?

Record your subjective opinion as well as your objective comments — the web is an experience that involves your students just as a traditional setting should, and if you aren't enjoying it, there's a good chance the students who try it won't either. Are the directions clear and concise? Is it easy to get back to the beginning? Can you search the site for specific areas of interest?

If you can, take a course yourself. Pick one you'd really like to know something about, and follow along. If there's a textbook required, make the purchase yourself, so you can determine just how easy or difficult it is to accomplish this task. Make sure the courseware comes from an impeccable source and tracks perfectly with the course.

If you are comfortable with the technical material offered in the courses, then you'll want to evaluate the classes and textbooks yourself. If not, you'll need to enlist the aid of a technically oriented professional who can help you.

Last, but certainly not least, is the quality of the service you can expect from your online provider in helping to set up your training, communicate to your participating employees and your management, and to evaluate the success of your program. Your provider should be more than willing to help make your kick-off meeting(s) succeed, to help train the administrators, and to make sure your program is everything you want it to be. Further, your provider should be happy to help you develop your rollout plan, making constructive suggestions to improve the quality of the program over the years to come.

Who should be on your evaluation team?

The task force to evaluate your online training should consist of the people most likely to help make it a success, and of course that will be different in every organization. However, there are certain key people you should consider recruiting. You should have (if possible) a professional educator on the team to help you optimize the experience for your students. If you are training IT professionals, you should have (at least) one on your task force. If you are training sales people, you should have one of those. You should have a financial analyst on your team to help you identify your true costs and to help you project rollout costs.

What's the next step after the preliminary screening?

Your next step is to decide if you are ready to implement a full-scale online training program as a component of your program, or whether you would prefer to begin with a pilot. If you opt for the pilot, you'll want to define your pilot's objectives and strategy in a pilot plan before you construct your pilot RFP (Request for Proposal). (If you would like our white paper on the subject How to plan, implement, and evaluate a successful online education pilot, please call toll-free: 1-800-434-3466, or visit our website at www.elementk.com).

If you decide to go straight to an implementation phase without a formal pilot, you are also ready to develop your RFP. You'll want to choose a small, manageable number of providers to bid on your program — no more than four, for example.

How to develop an online education RFP *(Request For Proposal)*.

Once you've decided on your criteria for online training, it's time to step back and consider the various attributes of a potential online training partner, and to ask your RFP questions in such a way as to give you complete information.

Here is an RFP outline, in question form.

1. Background.
2. What is the legal status of your firm? How long has your company been doing business?
3. Please provide your firm's most recent full year's financial statement.
4. What is your company's background in training?
   A. Discuss any classroom training capability.
   B. Discuss any courseware capability.
   C. Discuss your online capabilities.
5. What is your company's background in technology?
6. What is your company's background in the Internet?
7. Talk about any IT vendor partnerships that you currently have in place.
8. How many online training business customers do you have?
9. How many online seats have you sold?
10. List the customers that make up the top third of your business, and include two references from large-scale customers (over 1000 seats), and two from medium-scale customers (500-999 seats).
11. What is your philosophy of online education and training?
12. Describe the interactive parts of your instruction, including instructor feedback, class lounges, live chat rooms, online mentoring and online help.
13. List the courses you offer (or attach a catalog).
14. What certifications do you prepare for?
15. Describe the types of courses you make available.
    A. Talk about instructor-led courses.
    B. Talk about online tutorial courses.
    C. Discuss any workshops or seminars you provide.
    D. Discuss live training events.
16. Describe any assessment techniques that are built into your program.
17. Describe the training administrative and reporting methodology and options.
18. Discuss add/delete procedures for individuals and groups, including self-registration.
19. What system requirements are needed to use your online training?
20. Describe the marketing and implementation support you provide for your program.

21. Discuss communications — vendor to training administrator and students as well as between training administration and students.
22. How can my site be customized and personalized?
23. How often do you introduce new courses, how often do you refresh your existing courses, and how do customers learn about the upgrades?
24. Describe your support structure for maintenance service, software upgrades, problem-reporting processes, and student help.
25. Provide detailed pricing for X students/year in computer professional training, Y students/year in personal computing software, and Z students/year in business/marketing areas. Be sure to include a discussion of any quantity discounts that are available.

How to analyze your responses.

We'll refer here to the 25 questions posed above. Here are some hints as to how to interpret and weigh the answers.

Question 1. *Background.* This is for flavor only — good to know, but not essential. Most online training companies have experience in classroom training, in courseware, or in technology. A background in all three is the most desirable.

Question 2. *Legal status.* You should look for a firm that has an online identity of its own, rather than one that is a small part of a much larger entity. Because online education is so hot right now, some firms have an online presence that's there for show, and you probably don't want that.

Question 3. *Financial statement.* Here you're looking for stability and growth.

Question 4. *An online provider with* a classroom facility is a plus because it means that the online courses are rooted in solid experience. A courseware developer is also a plus, because it means that the textbooks fit the curriculum perfectly. And of course online experience is a must — you'll be looking for both tutorial and instructor-led courses.

Question 5. *Background in technology.* Because online service depends so heavily on the equipment and the set-up, you want to do business with a vendor whose technological foundation is extremely sound.

Question 6. *What is your company's background in the Internet.* There are many similarities between e learning and learning. But there are also significant differences. Look for a company that has learned the difference through experience.

Question 7. *IT partnerships.* Here you should be looking for solid relationships with the key software developers — Microsoft, Novell and Lotus, for example.

Question 8. *How many customers?* Look for a reassuringly large number — with at least a few names you recognize.

Question 9. *Look for a very large number* — at least a quarter of a million for starters. Every vendor seems to be claiming leadership, but the number of seats is where the rubber meets the road.

Question 10. *List of customers and references.* Make sure you call them. No one puts down a bad reference, but you'll still find out a lot about the vendors you are considering this way.

Question 11. *Look for a coherent point of view* about training in general and online training in particular.

Question 12. *Interactive instruction.* Look for classes with instructor feedback, class contact in lounges or chat rooms, posted responses.

Question 13. *Look for a complete catalog,* including at least the core courses you are interested in presenting to your employees.

Question 14. *Look for the important certification players:* Microsoft, Novell, Lotus, and other professional certifications.

Question 15. *Types of courses.* You'll want a balanced mixture of instructor-led courses, self-tutorials, seminars, workshops, and live events.

Question 16. *Look for built-in tests and assessment methodology* you can use as a standard measure of performance.

Question 17. *Administration.* Make sure the site is easy to administer that the reports are appropriate for your firm, and that the administration site is secure.

Question 18. *Add/delete.* Since this is the most common administrative procedure you will be performing, be sure it's quick and easy.

Question 19. *Make sure you can provide whatever is required.* Some software tutorials do not require that the software being taught be installed on the teaching computer. This makes it easier for employees studying from a remote location — they may not have your office software resident on their laptops.

Question 20. *Marketing support.* Look for a total program here. Communication makes the online training go smoothly. Look for a marketing package that includes emails, posters, employee direct mail, and incentive suggestions.

Question 21. *Communications.* Your provider should give you the ability to communicate with one or all students, as well as

providing a channel between the vendor to communicate directly with the students on course-related issues.

Question 22. *Customization and personalization.* It is important to be able to make the site yours. Customization schemes should at least permit you to have your own version of the online site, complete with your logo and internal email. You may also value the ability to limit the number of courses to those relevant to your needs.

Question 23. *Course upgrades.* Look for constant improvement here. The vendor you probably want will be frequently improving existing courseware and introducing new courses at least weekly.

Question 24. *Maintenance and support.* Look for 24x7 support — in redundant channels — by 800 number as well as online.

Question 25. *Pricing.* Make sure you price the training you think you will actually use. Provide a matrix in your RFP so there is no question in your mind about the price comparison.

What's really important?

Overall — how good is the training? Does it provide adequate coverage of the material? Does it make extensive use of real-life scenarios? Does it provide ample review and practice opportunities? Is it appropriate for all levels of students who might require the training? Does it require an easy and immediate transition from learning to application? Does the training provide a range of learning and review modes? Short answer, multiple-choice, and presentation, for example? How will students rate the experience? How will their managers rate their training? Will they be able to use the training immediately on the job? Are the IT students on track with their professional certifications? Is the course selection relevant to your firm's needs, and current?

Administrative issues. Is the site easy to set up and manage? Are the reports quick, clear, and comprehensive? Is the support 24x7 and excellent? Are you impressed with the account manager — how good is the service?

Performance issues. Is the quality of the training as good or better than that of classroom training? To assess the training, you will want to adopt your own measurement criteria — but they could include standardized testing, real-world review, measuring a classroom control group against an online group, and conducting exit interviews with online participants.

Cost/ROI

Overall, here are some of the variables: number of seats you will purchase, cost per seat. If you are comparing the cost of online training to classroom training, don't forget to estimate the opportunity cost of students' time lost from work — since this is such a large factor in most classroom sessions. Add in cost of textbooks. Estimate incremental cost of online access and phone use.

Not all online vendors price the same way — making the job of comparing their costs no piece of cake. Some vendors charge per class, others per student. Some charge a fixed price per student for unlimited access to a particular subject area. Others require you to purchase bundles of seats at a time. Make up a matrix that fits your situation and include it in the RFP. Let the vendor price it for you — your way. That will save you a lot of time and effort later.

Who should participate in the evaluation?

You, your administrator, a representative of each class of students, a business analyst, and a professional educator (if possible). And one practical tip: while you want input from everyone involved, the smaller your evaluation committee, the more quickly you will be able to come to a decision and move forward.

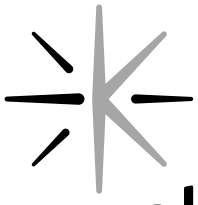
Where do you go from here?

Pick a provider, try it for at least a year; if there are problems, don't despair—you may be able to fix them. You need (you guessed it!) a plan. What should be in your plan? Contact us and we'll help.

Where should you go?

Element K
www.elementk.com
1-800-434-3466

†Samuel Johnson, Saturday, 30 July, 1763, as quoted in Boswell's Life of Johnson,. by James Boswell), Oxford University Press, 1953 edition, 1960 printing, page 324.



element k

500 Canal View Boulevard
Rochester, NY 14623
1-800-434-3466
www.elementk.com

80-141-57
4/00