

The Worst Case Survival Plan Book: Exit Strategies for e-Learning Projects

presented by Saul Carliner

About this Session

Most instructional designers and project managers plan e-learning projects for success. In the real world, however, some projects still turn sour. Vendors go out of business. Technology does not work. Teams do not coalesce. This session explores issues you can address before a project begins so that you can protect your work from a possible "disaster" afterwards. This session also identifies issues to consider should you need to implement an exit strategy.

Who Should Attend

Managers, project managers, senior course developers, consultants, and others who work on either side of a contractual business arrangement.

About the Presenter

Saul Carliner is an internationally known expert on e-learning and information design. His books include *Advanced Web-Based Training*, *Recent Research in Information and Document Design*, *Designing E-Learning*, *An Overview of Online Learning*, *Techniques for Technical Communicators*, *Training Design Basics* and the forthcoming *E-Learning Handbook*. As a consultant, he develops strategic plans and assessments, and provides training for clients like Berlitz, Guidant, IBM, Microsoft, ST Microelectronics, 3M, and several government agencies. He is also an associate professor of educational technology at Concordia University in Montreal, where his research focuses on emerging forms of online learning for the workplace and effectiveness and productivity metrics for workplace learning. He has quoted in the *Globe and Mail*, *Wall Street Journal*, *CBC*, *Global National*, *CNBC Asia*, *CNET Radio*, *TRAINING* magazine, and the *Jerusalem Post*. He is a past research fellow of the ASTD, Certified Training and Development Professional from the Canadian Society for Training and Development, and a fellow and past international president of the Society for Technical Communication. He holds a Ph.D. in instructional technology from Georgia State University.

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Opening Exercise

Instructions

- ❶ Break into groups of 3 to 5 people.
- ❷ Introduce yourself to the other members of your group.
- ❸ Appoint a spokesperson.
- ❹ Read through all of the “situations.”
- ❺ Discuss how you would handle each.

Situation	How You Would Handle It
<p>Situation 1: You are working on your third online learning project. Because your organization now has experience with online learning but merely lacks staff to develop the courses, you provided the course development firm with a detailed description of the course that you needed. This is the first time that the course development firm has worked for you, so you thought that the detailed project design would be helpful. But you are extremely disappointed with the first draft of the project. It does not match specifications and the technical information is inaccurate. You are not sure that you want to continue working with the vendor, and have a meeting scheduled for tomorrow morning.</p>	
<p>Situation 2: It's January 27. Last month, your organization signed a contract for a Learning Management System (LMS). As part of the contract, you are required to install and customize the system—about a 3-week process--but the marketing representative assured you that technical support staff is available to respond to questions. Your organization received the software January 5. You expected that the software would be up and running today, but your lead systems programmer says that it is not installed, and has no estimated date of availability. He has questions about the installation, and the technical support staff has not responded to his calls for the past three weeks. Your programmer even called the marketing representative, who is not returning his calls.</p>	

Situation	How You Would Handle It
<p>Situation 3: At the coffee shop this morning, while you were reading the paper, you nearly spit out your latte when you read that the firm developing your online courses just closed its doors (as in, no longer in business).</p>	
<p>Situation 4: Your product training team is working under the gun. Your organization is releasing a major new product in 5 weeks, and you must have online learning programs to support the product launch. Because your staff size is limited, you have hired an outside firm to assist you with the design and development of the courses. But apparently they do not understand the time pressure that your organization faces. After your SMEs missed a deadline, they have exercised a clause in the contract saying that they have an extra day of development for each day that your organization is delayed in providing feedback. Unfortunately, you don't have those days to give. Your final deadline is a fixed one.</p>	
<p>Situation 5: Because it provided so many unique features and the software publisher gave you a special "charter user" price, you chose an authoring tool that prepares courseware in a proprietary format. That is, you cannot use the files with other authoring tools and any learning management system (except the one provided by the vendor). In a business paper, you read that the vendor has few customers and is probably going out of business in a month. The vendor assures you that this is not the case. You're not sure whether you believe this.</p>	

<p>Why?</p> <ul style="list-style-type: none"> • Vendors go out of business. • Technology does not work. • Teams do not coalesce. 	<hr/> <hr/> <hr/>
<p>Signs of Impending Doom</p> <ul style="list-style-type: none"> • A significantly lower or higher price than other vendors • Vague responses to specific questions 	<hr/> <hr/> <hr/>
<p>More Signs</p> <ul style="list-style-type: none"> • Vendors who have a solution in mind, before they've even heard your needs • Clients who have a solution in mind, and refuse to pay for up-front analysis and design 	<hr/> <hr/> <hr/>
<p>Before a Project Begins</p> <ul style="list-style-type: none"> • These things shouldn't happen.... • Get real! • Never assume anything, you may have assumed incorrectly. 	<hr/> <hr/> <hr/>
<p>Do Your Homework about Services</p> <ul style="list-style-type: none"> • Learn <ul style="list-style-type: none"> — Standard project management methodology — Approximate resources needed for different types of projects — Realistic frames for schedules and budgets 	<hr/> <hr/> <hr/>
<p>Do Your Homework about Technology</p> <ul style="list-style-type: none"> • Learn: <ul style="list-style-type: none"> — Terminology — Appropriate use of different technologies — Must-have and nice-to-have functions and features 	<hr/> <hr/> <hr/>
<p>Protect Yourself in Services</p> <ul style="list-style-type: none"> • Ask for, and check references • Ask for samples of all deliverables, so that you know what to expect 	<hr/> <hr/> <hr/>

<p>More on Services</p> <ul style="list-style-type: none"> • Formalize all agreements <ul style="list-style-type: none"> — List deliverables and their due dates — Require source files with each draft — Identify service levels, such as turnaround on review drafts — Include penalties for both parties for missing milestones and service levels 	<hr/> <hr/> <hr/> <hr/>
<p>More about Agreements on Services</p> <ul style="list-style-type: none"> — Outline procedures for addressing a change in scope — Identify ownership of all components of the finished course — Include an “out” clause that lets you override non-competes on hiring staff 	<hr/> <hr/> <hr/> <hr/>
<p>Still More on Services</p> <ul style="list-style-type: none"> • Do not approach the RFP process as needs analysis • Do not go into the RFP process unless you actually plan to hire someone 	<hr/> <hr/> <hr/> <hr/>
<p>Protect Yourself on Technology</p> <ul style="list-style-type: none"> • Whenever possible, use industry standard software, especially for development • Ask for, and check, references • If using a new vendor, insist that all files be saved in standard formats 	<hr/> <hr/> <hr/> <hr/>
<p>More on Technology</p> <ul style="list-style-type: none"> • Formalize an agreement <ul style="list-style-type: none"> — List deliverables and their due dates — Identify service levels, such as turnaround on requests for assistance — Include penalties for both parties for missing milestones and service levels 	<hr/> <hr/> <hr/> <hr/>
<p>More about Agreements on Technology</p> <ul style="list-style-type: none"> — Provide for backup coverage — Limit the length of the contract — Include an “out” clause, which provides you with documented source code and allows you to override non-competes on hiring staff 	<hr/> <hr/> <hr/> <hr/>

<p>More on Technology</p> <ul style="list-style-type: none"> • Avoid pre-canned requests for proposals; develop ones based on your unique needs • Demand that vendors clarify all terms in plain language 	<hr/> <hr/> <hr/>
<p>Seek Advice</p> <p>Consider hiring an independent consultant to work with you to hire a vendor (one who is not interested in the business, but knowledgeable of it).</p>	<hr/> <hr/> <hr/>
<p>Use Payment as an Accountability Aid</p> <ul style="list-style-type: none"> • Pay in installments, rather than all at once (either up-front or at-the-end) • Include early exit penalties on both parties 	<hr/> <hr/> <hr/>
<p>Plan Your Exit Strategy</p> <p>Before signing the contract:</p> <ul style="list-style-type: none"> • Consider the worst case scenario • Determine how you would respond • Re-read the proposed contract to make sure it has the guarantees you need should that happen? 	<hr/> <hr/> <hr/>
<p>As Issues Arise During the Project</p> <ul style="list-style-type: none"> • Take a flexible attitude. • Note that no project runs smoothly all the time. • Let up-front agreements protect both parties. 	<hr/> <hr/> <hr/>
<p>Problem: Needs Analysis</p> <ul style="list-style-type: none"> • ...or lack thereof • Usually results in poorly scoped projects <ul style="list-style-type: none"> — Certainly the content — More significantly, schedule and budget • Stop and conduct the analysis. 	<hr/> <hr/> <hr/>
<p>Problem: Scope Creep</p> <ul style="list-style-type: none"> • Require sign-off for all out-of-scope work • At the time of request, determine whether it affects schedule and budget • Agree upon additional compensation, if appropriate 	<hr/> <hr/> <hr/>

<p>Problem: Technology Failures When told what technology cannot do, press the other side to say what it can do</p>	<hr/> <hr/> <hr/>
<p>Problem: Supplier Missed Deadlines</p> <ul style="list-style-type: none"> • Determine why the deadline was missed • Hold meeting to discuss • If appropriate, institute missed deadline clauses in contract 	<hr/> <hr/> <hr/>
<p>Problem: SMEs Missed Review Deadlines</p> <ul style="list-style-type: none"> • Determine why the deadline was missed • Hold meeting to discuss • If appropriate, institute missed deadline clauses in contract 	<hr/> <hr/> <hr/>
<p>Services</p> <ul style="list-style-type: none"> • Meet in person regularly, even after you have an established relationship • Request: <ul style="list-style-type: none"> — Regular status reports — Source files when receiving deliverables 	<hr/> <hr/> <hr/>
<p>More on Services</p> <ul style="list-style-type: none"> • Provide honest feedback, especially early on • Learn from the vendors so that you can pick up the work 	<hr/> <hr/> <hr/>
<p>Technology</p> <ul style="list-style-type: none"> • Verify that code is documented • Make sure that files work in agreed-upon formats • Provide honest feedback, especially early on 	<hr/> <hr/> <hr/>
<p>After All This, You Need to Exit Anyway</p> <ul style="list-style-type: none"> • Always do so within the terms of the contract <ul style="list-style-type: none"> — Legal reasons — Recipe for how to do it • Provide advance warning • Always be up-front, explain what and why 	<hr/> <hr/> <hr/>

<p>Specific Challenge: Budget Cut Rather than a complete exit, look for ways to salvage part of the project</p>	<hr/> <hr/> <hr/>
<p>Specific Challenge: Services Vendor Goes Out of Business</p> <ul style="list-style-type: none"> • Try to hire staff members onto your staff • Make sure you have latest versions of source files 	<hr/> <hr/> <hr/>
<p>Specific Challenge: Technology Vendor Goes Out of Business</p> <ul style="list-style-type: none"> • Try to hire a programmer from the vendor to support the code • Get documentation of the source code 	<hr/> <hr/> <hr/>
<p>Specific Challenge: Loss of Key Member</p> <ul style="list-style-type: none"> • Retrieve all project documentation • Institute “backup” clause • If the vendor does not have a backup, hire a replacement and cancel the vendor (if you had a backup clause) 	<hr/> <hr/> <hr/>
<p>Other Strategies</p> <ul style="list-style-type: none"> • For services <ul style="list-style-type: none"> — Work with two or three vendors (but not necessarily on the same project) — Be prepared to handle the work yourself • For technology: work closely with your IT department 	<hr/> <hr/> <hr/>
<p>And</p> <ul style="list-style-type: none"> • Regardless of how a project ended, conduct a post-mortem. • Learn <ul style="list-style-type: none"> — What worked — What didn't — How to improve 	<hr/> <hr/> <hr/>
<p>General Advice Plan for the worst and hope for the best.</p>	<hr/> <hr/> <hr/>