

Practical tools from CIPD research



Leading and managing people to deliver performance advantage is fast becoming a central challenge for us all. For those responsible for meeting this challenge it is essential to have, at their fingertips, tools to facilitate effective change.

We have produced a range of 'starters for ten' tools to assist practitioners' thinking and action on a range of current and emerging organisational issues. These tools, based on insights and good practice developed from recent CIPD research, are the result of extensive work with a large number of organisations from both the public and private sectors.

The tools include:

- Checklists
- Diagnostics to assess discrete HR interventions
- Frameworks that include a range of tools to review, plan and implement HR process change.

The tools in this series are:

1. Introduction to developing your HR strategy
Creating the framework for successful people management
2. Reviewing an occupational pension scheme
A diagnostic review
3. Employing ex-offenders
A good-practice framework for managing the issues
4. Assessing the effectiveness of the corporate HR function in an international organisation
A good-practice framework
5. Managing the introduction of e-learning
A good-practice framework
6. Developing managers for business performance
Managing the return on your investment in management development
7. Managing reward for business performance
How to develop a reward strategy
8. International mergers and acquisitions:
Preparing for HR's contribution to success
9. Managing the psychological contract:
Taking the temperature

We would welcome your feedback

If you have any queries about these tools or would like to contact us, you can get in touch with the CIPD at:

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Questions this tool is designed to help you answer

- What are the main issues I should consider when introducing (or reviewing) e-learning in my organisation?
- How can I make sure the different stakeholders in my organisation really understand the full implications of introducing e-learning?
- How can I assess how 'ready' my organisation is for e-learning?
- How can I prioritise next steps and effectively plan the implementation of e-learning?

Key benefits of this tool

For you:

- Build buy-in and understanding about the initiative from different stakeholders in the organisation through in-depth discussions about the process and what it will entail.
- Be more proactive in highlighting important issues that may arise during the implementation process.
- Gain consensus about how to deal with key challenges/issues that are identified.

For your organisation:

- Ensure that all the issues that can arise during the implementation of e-learning have been fully considered and thought through at an early stage in the process.
- Assess the extent of the organisation's readiness for the introduction of e-learning.
- Put together an implementation development plan and prioritise areas.

Who is this tool for?

- Training managers who have decided to introduce e-learning and are planning its implementation.
- General HR professionals with an interest in, or remit for, e-learning provision.

What's in the tool?

- A short overview of the implications for e-learning implementation from recent CIPD research, E-Learning: The learning curve <http://www.cipd.co.uk/changeagendas>
- A checklist of e-learning issues for each stakeholder group to consider.
- Three survey questionnaires for different stakeholder groups to complete to help them think through different issues that arise when introducing/reviewing e-learning.
- An implementation development plan to plan and prioritise actions.

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Introduction

In recent years, there has been much debate about the opportunities that have arisen in training and development as a result of new technology.

① **E-learning** and **blended learning** have become 'hot topics' in the HR world, but have not solely experienced widespread reviews. ①

Martyn Sloman discusses the early history of e-learning in his CIPD book *Training in the Age of the Learner* (2003) www.cipd.co.uk/bookstore as follows:

'Initially e-learning was shamefully oversold. In 2001, Tom Peters, management guru and author of *In Search of Excellence*, argued that the goal should be that 90 per cent of training in our organisations should be delivered electronically by 2003. A year later, the problems of implementing e-learning had become apparent. The term 'blended learning' had emerged as a way of positioning e-learning in a more apparent context'.

Designing effective e-learning

This tool aims to help practitioners think through some of the issues that arise during implementation so that they can prepare and plan appropriately. The tool starts from the position that the organisation has already decided to introduce e-learning, and is not aimed at organisations trying to decide

① whether or not e-learning is right for the **organisation's needs**. For further information about the advantages and disadvantages of e-learning, please look at the [information sources](#).

To be effective, e-learning systems must be designed, built and maintained so that the learners (end-users) have both the motivation and the opportunity to learn. In particular, the design should ensure that e-learning:

- provides easy access to learning opportunities
- provides high-quality learning experiences
- engages learners in a meaningful and useful way
- enables them to build on their learning and apply it back in the workplace.

In short, e-learning must provide learners with the opportunity to readily access, meaningfully engage and usefully apply knowledge for performance gain. Influences on whether this happens include factors found at all levels of the organisation, from senior management to the immediate work environment. As demonstrated in the CIPD's report,

① *E-Learning: The learning curve*; six issues are pivotal ([see Figure 1](#)).

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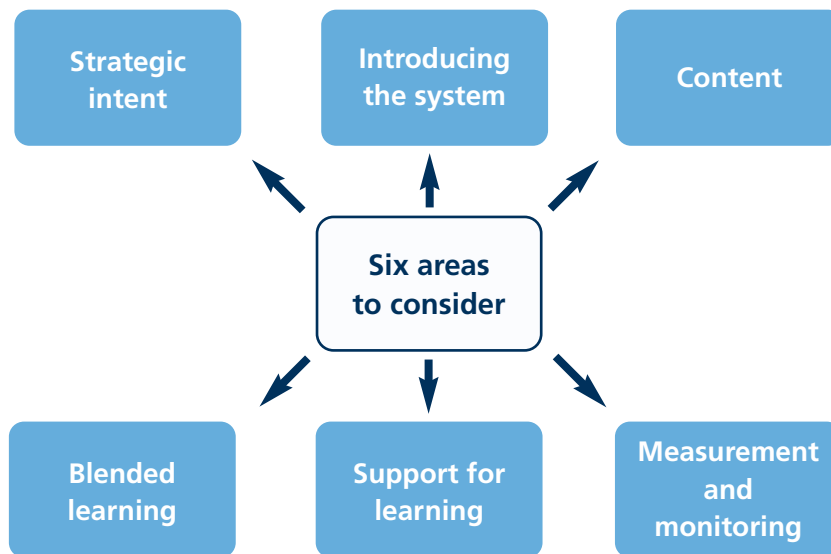
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Figure 1: The six main areas to consider for successful e-learning



These issues should be considered by all organisations seeking to implement or advance e-learning. In particular, think about:

- the strategic intent of the organisation
- the way that the initiative is introduced
- content – particularly its quality, relevance and suitability for the culture of the organisation
- the different types ('blend') of learning opportunities available (eg combination of e-learning, classroom training and on-the-job training etc.)
- the support that is offered to learners
- measurement and monitoring of effectiveness and satisfaction.

How to use this tool

You should use the series of questionnaires contained in this tool when thinking through the introduction of e-learning. They are intended to help you prepare for upcoming – as well as examining and improving ongoing – e-learning initiatives, and should be considered alongside the CIPD report, *E-Learning: The learning curve* – which is free to download from www.cipd.co.uk/changeagendas.

This tool is not designed to provide guidance on which technology system an organisation should choose. We don't believe there is one best technology for any given situation. Instead, many options are available, any one of which may be useful, depending on how it is implemented. As a result, the key challenge is to get decision-makers to understand that introducing e-learning should be managed as a full-fledged change initiative, not simply as the addition of new technology.

Using the tool

Tool map



Use this to see an overview of the tool layout. Click on the appropriate section if you wish to go directly to an activity or diagram, or you can follow the tool through in sequence.



Where you see this symbol, hover the cursor over it or the **blue text** for more information using your mouse.



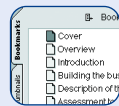
Click on this message (in the corner of your page) to return to your original position in the tool.

Thumbnail



Accessed at the side of Acrobat's program window. Use this to view quickly the length and appearance of the tool.

Bookmark



Use this to see at a glance the different sections within the tool. Click where you wish to go with your mouse to navigate quickly within the tool.

Print



Use this facility to print the tool out (including any sections you have completed online). Please note that it is not currently possible to save your work in the tool.

Hyperlinks

Red links will link you to the CIPD website or an external website.

Blue links that are underlines will link you to other areas within the tool.

Description of the tool

This tool categorises and draws attention to the issues and challenges that underpin the effectiveness of e-learning. While all issues are of concern, different stakeholders (business leaders, training managers and line managers) are assumed to have primary responsibility in some areas more than others.

- [Managing stakeholders](#) provides an overview of the key issues for the different stakeholder groups. The issues checklist in [Table 1](#) summarises the main points for stakeholders to consider.
- [Survey questionnaires](#) for the different stakeholders to complete, comprising a series of statements with rating scales, have been designed to enable you to review and rate the extent to which your e-learning initiatives have been appropriately planned and executed.
- And [next steps](#) details how you should use your answers to develop an implementation plan.

As with all instruments of this kind, a word of warning regarding its power to assist must be given. Any instrument requires careful interpretation and we therefore encourage you to strive for objectivity when using it.

Managing stakeholders

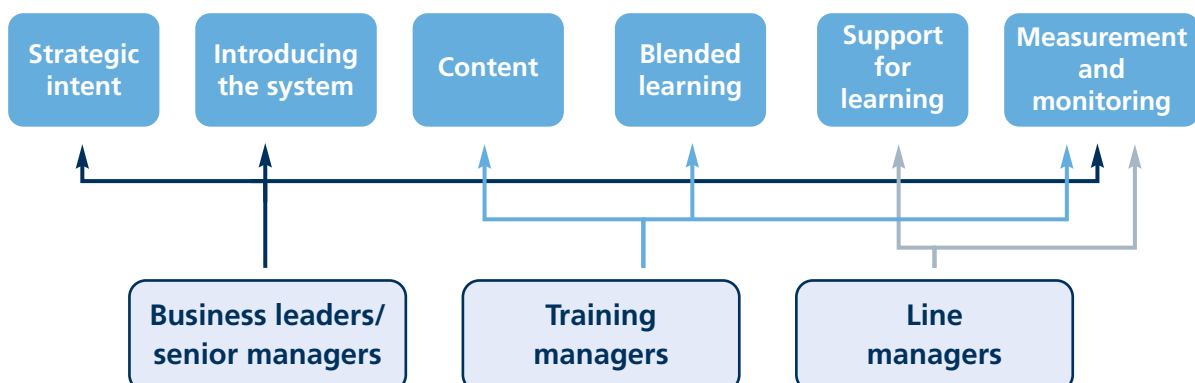
The introduction and maintenance of initiatives such as e-learning involves a number of stakeholders across an organisation. For the purposes of this tool we'll focus on three main groups:

1. business leaders and senior managers
2. training managers
3. line managers.

The stakeholder group missing from this stage is the 'learners' themselves. We suggest that you initially focus on gaining input from the three stakeholder groups above. Once this initial exercise has been completed, the e-learning strategy and plans can be reviewed (and if necessary amended). After this, a similar exercise can be undertaken with learners to gain their views and input into the revised plans and to ensure that their perspective has been drawn on and understood.

At the level of 'business leaders and senior managers', there are those who are making key decisions about the organisation's learning strategy and how e-learning will fit into this. Questions should be asked about **why** changes are being undertaken, and efforts to plan **how** should be started. Training managers should also be asking **why**, but they should delve into detail on **how** and **when**. Line managers should concern themselves with the question of whether users are actually learning effectively via this form of training. This is to some extent a relative question – we can assume they are learning something – but is it as much/as deep/as effective/as relevant/as applicable as the learning they might accomplish via face-to-face or other models of learning? Evaluation of this sort is a concern for all stakeholders, as it is necessary to take stock of progress and problems from multiple angles and levels.

Figure 2: The key issues for different stakeholder groups



There are other concerns that cross boundaries between stakeholders. Initially, all stakeholders should be concerned that users have exposure to appropriate information while online. Are the resources meaningful and useful to learners?

Writers from many theoretical camps have argued that learning requires more than access to information – it requires time to reflect, to experiment, and to adapt ideas (for more information on research on learning models, see the CIPD research report, *How Do People Learn?* www.cipd.co.uk/bookstore). Therefore all stakeholders should ask whether this type of learning is being encouraged and supported during the design phase of an e-learning initiative.

Implementing e-learning: issues checklist

The 'issues checklist' in Table 1 pulls together some of the key issues the different stakeholders groups should be considering during the planning stages of an e-learning implementation project. It may be useful to read through these before completing the questionnaires to understand a bit more about what each stakeholder needs to think about.



Table 1: Issues checklist

Stakeholder group	Primary areas to focus on	Issues to consider	Has the issue been considered?	
			YES	NO
Business leaders and senior managers	Strategic intent of the organisation	<ul style="list-style-type: none"> Differing or contrasting views about the strategic intent at senior levels may exist – do you have clear agreement on why e-learning is being introduced? 	<input type="checkbox"/>	<input type="checkbox"/>
		<ul style="list-style-type: none"> Varying needs for e-learning may occur over time – is there shared understanding of both short- and long-term aims in the e-learning strategy? 	<input type="checkbox"/>	<input type="checkbox"/>
	Resources to develop and introduce the system	<ul style="list-style-type: none"> Varying needs across business units may also exist – do you understand the resource requirements for different business units in the short- and long-term? 	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> Have you considered resources ie people, skills, technology and learner support when deciding budgets/resource allocation? 		<input type="checkbox"/>	<input type="checkbox"/>	
	Measurement of effectiveness (organisational level)	<ul style="list-style-type: none"> Have you decided a process for ongoing evaluation to assess the short- and long-term impact of initiatives against objectives? 	<input type="checkbox"/>	<input type="checkbox"/>
		<ul style="list-style-type: none"> Have you remembered to retain some flexibility in evaluation to cope with changing strategic objectives? 	<input type="checkbox"/>	<input type="checkbox"/>
Training managers	Content offered	<ul style="list-style-type: none"> Have you assessed the end-users' level of IT skills so you know they have the skills to participate fully in e-learning programmes? 	<input type="checkbox"/>	<input type="checkbox"/>
		<ul style="list-style-type: none"> Where will the learners undertake the e-learning – at their desk or in a neutral environment? 	<input type="checkbox"/>	<input type="checkbox"/>
		<ul style="list-style-type: none"> Have you made estimates for the speed of development of e-learning content ie off-the-shelf (generic) vs customised (bespoke) materials to enable project planning? 	<input type="checkbox"/>	<input type="checkbox"/>

Stakeholder group	Primary areas to focus on	Issues to consider	Has the issue been considered?	
			YES	NO
Training managers	Blend of learning opportunities	<ul style="list-style-type: none"> What criteria will you use to decide the appropriate blend of learning techniques? (ie what type of training would be most appropriately delivered via e-learning and what by other learning methods?) 	<input type="checkbox"/>	<input type="checkbox"/>
	Measurement of effectiveness (learner level)	<ul style="list-style-type: none"> What criteria do you intend to use to evaluate the effectiveness of e-learning? How are you intending to measure the ROI? How are you going to identify whether learners are satisfied with the e-learning and whether it is considered an effective learning medium? Have you thought about the perceived impact on the organisation's external and/internal environment – is it positive or negative? 	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
Line managers	Resources committed to supporting learning	<ul style="list-style-type: none"> Have you assessed how conducive the work environment is to learning (open, collaborative etc)? Are you aware of the cultural assumptions about learning/training in the workplace? Are your managers supportive? Are any additional support mechanisms needed to support the introduction of e-learning? What will you offer to learners? 	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
	The systems in place to measure and monitor learner activity and performance outcomes.	<ul style="list-style-type: none"> Have you established mechanisms to assess progress towards goals and to share experiences to determine best practice? Have you set up feedback channels for open and honest feedback? How will you monitor e-learning programmes in terms of effectiveness of the learning delivered? Do you check that e-learning courses are fit for purpose and that individuals are effectively applying their learning back in the workplace? 	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>

Using the questionnaires

You will find three questionnaires (A, B, C) for different stakeholders to fill in:

- [Questionnaire A](#) – for business leaders and senior managers
- [Questionnaire B](#) – for training/HR managers
- [Questionnaire C](#) – for line managers.

The questionnaires can be given simultaneously to several representatives of the stakeholder group (eg three line managers). Responses can then be compared and discussed to make sure that agreement is gained about current progress in e-learning and issues that still need to be dealt with.

It may then be useful for a representative from each stakeholder group to get together with the representatives from the other groups to discuss the survey responses. The tools include an implementation plan for you to use when planning your [Next steps](#).

Questionnaire A

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To be completed by business leaders and senior managers

Business leaders and senior managers must be clear about why a change in learning strategy is being pursued and ensure that the existing infrastructure can support the achievement of intended objectives. Senior management should not only understand what is sought with the initiative, but how success will be measured. Perhaps most importantly, managers with this level of responsibility should make sure that the organisation does not pursue an initiative that is beyond the capacity of the social and technical systems in place within the organisation. If the systems or people are not ready, they should be made ready before the launch.

Read through the following statements and consider the extent to which each one applies to your organisation's current position. Then tick the most relevant box.



1. There is clarity and consensus about the strategic intent of the e-learning initiative across the organisation.

Completely applicable Broadly applicable Barely applicable Not applicable

2. The implementation plan for e-learning relates to the organisation's strategic objectives.

Completely applicable Broadly applicable Barely applicable Not applicable

3. Costs and benefits from delivering e-learning have been discussed and anticipated.

Completely applicable Broadly applicable Barely applicable Not applicable

4. The short- and long-term investments in infrastructure and other resources have been fully considered.

Completely applicable Broadly applicable Barely applicable Not applicable

5. The organisational culture is supportive of e-learning.

Completely applicable Broadly applicable Barely applicable Not applicable

6. The criteria to measure the outcomes sought by the e-learning initiative are readily available and accepted by management and employees as meaningful.

Completely applicable Broadly applicable Barely applicable Not applicable

7. Hidden costs for technology, technology support, loss/gain in user time have been explored.

Completely applicable Broadly applicable Barely applicable Not applicable

8. The target audience is prepared, with the functional skills (eg IT literacy) necessary to benefit from this initiative.

Completely applicable Broadly applicable Barely applicable Not applicable

9. Updating the skills and knowledge of HR personnel and line managers to support this new kind of learning has been considered and planned.

Completely applicable Broadly applicable Barely applicable Not applicable

Questionnaire B

To be completed by training/HR managers

While business leaders and senior managers determine the **why**, training and HR managers must determine the **how** and make implementation plans a reality. Therefore considerable expertise is needed in the content to be provided, the technology for delivery and the support for learners. Moreover, as training managers are in a position to collect and interpret data about user preferences, the responsibility for tailoring the initiative to the audience rests substantially in his/her hands. Training managers must oversee efforts to ensure that learners can locate and learn from materials. A realistic appraisal of whether internal resources are sufficient is needed, and should be communicated to senior management. In the absence of sufficient resources, the best-laid strategy will fail.

Read through the following statements and consider the extent to which each one applies to your organisation's current position. Then tick the most relevant box.



1. The organisational culture is supportive of e-learning.

Completely applicable
 Broadly applicable
 Barely applicable
 Not applicable

2. The current IT infrastructure will allow all users to have easy, simple and fast access to the e-learning.

Completely applicable
 Broadly applicable
 Barely applicable
 Not applicable

3. The variety of approaches that can be blended into a high-quality learning experience are known and understood.

Completely applicable
 Broadly applicable
 Barely applicable
 Not applicable

4. The blend of training techniques used will deliver the desired learning outcomes, align with available resources, and meet the expectations of users.

Completely applicable
 Broadly applicable
 Barely applicable
 Not applicable

5. Sufficient e-learning expertise is available to critically examine competing products before purchase.

Completely applicable Broadly applicable Barely applicable Not applicable

6. Designers (or purchasing agents in the case of outsourcing) are flexible and user-centred in their choice of blending approaches.

Completely applicable Broadly applicable Barely applicable Not applicable

7. Appropriate e-learning content to be delivered has been identified.

Completely applicable Broadly applicable Barely applicable Not applicable

8. There are sufficient internal resources to develop customised training.

Completely applicable Broadly applicable Barely applicable Not applicable

9. Appropriate testing of content across user-groups has been considered, including making sure it is easy to use and understand, and is pitched at a level appropriate for the learner.

Completely applicable Broadly applicable Barely applicable Not applicable

Questionnaire C

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To be completed by line managers

Line managers bear the responsibility for ensuring that knowledge is located and leveraged by users and that support in terms of time and resources is made available when needed. Therefore line managers must provide enough support and encouragement for users to encourage engagement, reflection and experimentation. Clear strategy by senior management and high-quality design by training managers will have no effect unless learners are assisted in their efforts to gain new knowledge and apply it on a daily basis.

Read through the following statements and consider the extent to which each one applies to your organisation's current position. Then tick the most relevant box.



1. Resources (financial, infrastructural, technological) to support users' learning efforts have been planned.

Completely applicable Broadly applicable Barely applicable Not applicable

2. Learners are believed to have sufficient skill, confidence and motivation to be responsible for their own learning.

Completely applicable Broadly applicable Barely applicable Not applicable

3. Line managers have confidence that learners will respond to appropriate opportunities when these are made available to them.

Completely applicable Broadly applicable Barely applicable Not applicable

4. Line managers have the appropriate skills to support learning in the workplace.

Completely applicable Broadly applicable Barely applicable Not applicable

5. Criteria to monitor learners' efforts are known and understood.

Completely applicable Broadly applicable Barely applicable Not applicable

6. Plans include signed learning contracts or some other means to ensure learners have time to access and use the materials.

Completely applicable Broadly applicable Barely applicable Not applicable

7. Criteria to measure performance outcomes of the e-learning initiative are in place.

Completely applicable Broadly applicable Barely applicable Not applicable

Next steps

The questionnaires are intended to be answered by individuals with specific roles in the planning and implementation of an e-learning strategy. The design of the tool and our intention is that most of the answers should be positive (eg 'completely applicable' or 'broadly applicable'). It is likely that some ambivalence and/or negative answers (eg 'barely applicable' or 'not applicable at all') will emerge and this provides a chance to consider further refining of your approach and implementation plans.

After completing the questionnaire, all the representatives of a stakeholder group should spend time talking through their responses. If consistent across stakeholders, this offers some reassurance that objectivity has been preserved. If there are notable differences in the answers given, you have the opportunity for further discussion and sharing of perspectives.

Following this, representatives of each of the stakeholder groups should meet to discuss their views on issues that require further consideration before full implementation plans are drawn up. At this stage it may be useful to think about the six areas identified in the CIPD research *E-Learning: The learning curve* <http://www.cipd.co.uk/changeagendas>

- strategic intent
- introducing the system
- content
- blended learning
- support for learning
- measurement and monitoring.

Stakeholders are then encouraged to complete the [implementation development plan](#) for key issues to agree an approach to move the organisation closer to the 'completely applicable' box. This involves:

- prioritising which of the weak areas to address and when
- agreeing targets and timescales
- deciding what might be acceptable evidence of success
- collecting baseline data so that 'before' and 'after' action can be compared.

Involving learners

When the issues arising from the first stakeholder exercise have been agreed and subsumed into the e-learning implementation plans, a further exercise should take place with another key stakeholder group: learners. This could involve a number of structured interviews or a series of focus groups. Some key issues to address with this group are:

- the extent of their understanding and buy-in to the strategic objectives of the proposed e-learning initiative
- discussion of levels of IT skills and employee attitudes to learning in this way
- views on where learners would prefer to undertake e-learning (at home, at their desk, in a training room etc)
- views on what kinds of subjects they would prefer to learn via this methodology
- advantages and problems they anticipate with this learning in this way
- views on how they will manage making time for learning if e-learning is to be delivered at their desks
- views on what support they would like from their line managers and the training/HR department when this new form of learning is introduced.

Efforts should be made at the beginning of these events to clearly explain what e-learning is, why it is being introduced, when and how it will be introduced (large roll-out or initial test project?), and how it links together with other HR and learning initiatives. Clear communication is essential.

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Issue to be addressed:

What are you trying to achieve?

Target:

How are you going to get there?

Route:

When are you aiming to get there?

Timescale:

How will you demonstrate that you have achieved the target?

Evidence:

Sources on the CIPD website

[*E-learning: the learning curve*](#) (Change Agenda)

[*E-learning – frequent questions answered*](#) (Topic for Trainers)

[*The e-learning revolution*](#) – **Martyn Sloman** (Book)

[*Learning styles in e-learning*](#) (Topic for Trainers)

[*2003 training and development*](#) (Survey Report)

[*Reflections: new developments in training*](#)

[*Focus on the learner*](#) (Change Agenda)

[*How do people learn?*](#) (Research Report)

[*The future of learning for work*](#) (Executive Briefing)

[*Training in the knowledge economy*](#) (Research Report)

This tool was prepared by **Lynne Caley** (Cambridge Programme for Industry), **Ken Brown** (University of Iowa) and **Jessica Rolph** (CIPD).

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