An Implementation Playbook for the YourMembership Learning Platform

10 Project Streams in 10 Pages

Before you begin, you should know….

This is not a project plan, but a general framework and outline for you. Your project team will also develop a detailed project plan and more formal documents.

The intent of this document is to provide an easy guide to refer to for decisions, tasks and other considerations to make within implementation.

The goal is to provide a consultative, friendly approach to the decisions you will need to consider as part of implementation.

Each section is meant to be a focus area in the implementation or "project stream". The major project scope areas are listed below.

You are not alone. We'll walk you through the process at various stages during implementation, at kickoff, and through discovery.

Goals, Strategic Objectives + Desired user experience

Brief description: Let's think big picture. What's the vision, who are we intending this for, and why?
Vision: Defining clear goals for this program, the audience, and ensuring the team is aligned.
Key questions

1. What are the overall objectives this program aims to deliver? What pain points or organizational challenges are we attempting to address? What programs are we replacing or expanding?
2. What motivations are there for the participants to come visit the education portal? (e.g., mandates, changes in profession, competitive edge in a crowded field.)
3. What key dates and milestones are important to be aware of and should align with our planning process?
4. Who is the intended audience for this initiative and what do we know about them in recent data?
5. What competition or market forces should we be aware of and plan for in the launch?

Decisions, considerations, and thoughts

1. Who will be the main contact and project liaison on your side? This is typically the PM that represents your stakeholders and provides an interface to our project team.
2. What will be the key date for initial, public launch?
3. Start thinking about the Minimal Viable Product (MVP). What features in the MVP should we seek to initially release?
4. We will need 10-12 weeks for the full implementation in our plan. Team members from IT, Marketing, Membership, and Education will be needed. No one will require full dedication, however, expect to utilize up to 10 hrs. of each person's time through the implementation, and at least 4.5 hrs./week from the lead.

Process steps and when we will discuss this

1. Pre-discovery calls that we will schedule, and the initial part of our agenda onsite during kickoff.
2. Goals will be to meet main stakeholders, discuss key objectives, and plan details of a kickoff.
3. Kickoff will focus on key areas: the project process, charter, and communications, *PLUS* the "streams" or categories of work.

Who should be involved

- Executive sponsors, major stakeholders for IT, Marketing, Membership, and of course, Education.
- Designate 2 hours for a few calls prior to kickoff for a pre-kickoff debrief to align plans and agenda prior to kickoff. Designate a minimum 2 days for kickoff, and 1-2 weekly meetings. (2-4 hrs./week)
- Assume that at the onsite kickoff we will reserve the first half of the day on project goals, objectives, communication plan, charter, stakeholder introductions, and high level goals?

Risks and issues to be aware of

1. Don't wait for a grand unveiling. Build and release quick wins, even if the audience is limited.
2. Don't try to build a massive inventory by migrating everything you have. Be selective, build with strong "titles" and items that will attract initial audiences.
3. Marketing must be involved to promote the program and its release. A plan needs to be developed.
4. Invite possible stakeholders as part of iterative releases. Get their buy-in early; don't surprise them.

Artifacts to be created: 1) project charter: roles, responsibilities, communication plan, change order template

The Platform: Selection + Configuration of features, modules

Brief description: Review of platform features/modules, configuring them, the integration, and best practices
Vision: making the right choices in the settings of software to your specifications and needs.

Key questions
1. What key actions will take place and what user stories will we need to cover in short term and long?
2. Let's discuss how you envision the participants' experience of the dashboard and other parts of the platform like grades, catalog, and content. What will it look like and what items should be presented to participants in key areas?

Decisions, considerations, and thoughts
1. Who will be the distinct audiences served in the site who will need specific pricing/content/feature?
2. What current features and workflow need to be re-created/improved on the new LMS?
3. What report needs for compliance, management, and other requirements can you share?

Process steps and when we will discuss this
1. We will conduct a few tours of the platform: dashboards/interfaces, catalog, admin, course setup, tests and surveys. This we'll conduct during initial kickoff days and again later to cover all points.
2. We'll review your current offerings and conduct/document a gap analysis.
3. We'll capture user stories of the key user types who will use the site, and roles/permissions needed.
4. We'll begin capturing requirements and document your choices on features and configurations through implementation.
5. Content and Catalog features will be reviewed but will be handled by Content experts in a different stream.

Who should be involved
- Education and IT.
- IT will need to lead the integration as a main point of contact
- Education will lead the effort on: feature selections, and review of current features on the legacy systems, future settings on the new platform.

Risks and issues to be aware of
1. If it's too complicated to describe a feature or process in a few sentences, it's likely too complex. Consider simplicity to ease management and operational overhead.
2. Try to go minimal on first release. We believe our core feature set will offer a highly competitive offering - therefore, required customizations should be "layered" in iterations after a core release.

Artifacts to be created: 1) user stories 2) feature checklist 3) integration diagram 4) gap analysis

Integration + Data exchange

Brief description: What systems will need to be integrated with the LMS and what data to share
Vision: Seamless integration with your key systems of record.

Key questions

1. What are the key systems for Authentication, Products, Grades/CEU, ecommerce and CRM that need to integrate?
2. What exactly will be exchanged in each of these data points and what frequency?
3. What historical data for transcripts and user grades/CE are required to migrate?

Decisions, considerations, and thoughts

1. Do you have the internal resources/bandwidth to work with our team for these integrations?
2. Is there an internal sandbox for each system with which we integrate?
3. Where are the legacy records that need to be migrated and what info needs to move?
4. How will the buying process of courses/education happen - where will "checkout" occur?
5. Will there be any other ways of gaining access outside the primary login you designate? 3rd party Integration?
6. On Day 1 of your new learning portal, what historical data will you need? Can you provide a sample of the data?

Process steps and when will we discuss this

1. We will review how the user finds the portal, logs in, and how data gets back into your systems
2. We'll key in on the process for search, discovery, and purchase of education.
3. We will develop an integration spec document.
4. The project team will review your requirements for data: grades, CE, certificates to migrate
5. We'll discuss and plan a cutover plan from your legacy platform (if applicable).

Who should be involved

- Education and IT. An IT resource will need to lead the integration as a Main Point of Contact
- Similarly, an IT resource will need to collaborate with data migration and work to define and refine the data that needs to be ported.
- Education will lead the effort on feature selections and review of current features on the legacy systems and future settings on the new platform.
- Operations and IT staff to coordinate the cutover and launch of the new portal, and transition from legacy systems.

Risks and issues to be aware of

1. There is a need for IT resources and collaboration. If there are resource issues, we need to plan.
2. We focus on a basic integration as one of the first deliverables, will there be IT resources immediately available?

Artifacts to be created: 1) integration diagram 2) data needs 3) migration and cutover plan 4) sharing of relevant APIs and data schema

Things we need from you: demo access to your key systems: SSO logins, staging site access, and logins to any legacy learning systems.

Assessment and Evaluation

Brief description: Setting up the tests and evaluations/surveys in the platform.
Vision: Authoring and configuration tests and evaluations in the most optimal way.

Key questions

1. What tests and surveys will need to be set up?
2. Will there be a need for self-assessment?
3. Are the current (legacy) tests and surveys in an import-friendly format?

Decisions, considerations, and thoughts

1. Consider the rules and settings that are needed in your tests for compliance, accreditation, and or other professional/industry requirements.
2. What data and reports need to be captured? Will these be met with standard reports?
3. Do you have standalone educational content that needs to be tracked by "bundling" them with the tracking offered in tests, quizzes, and or evaluations? Examples include: documents, videos, or archives from webinars.
4. If tests and or surveys in legacy format requires conversion, we will need to build that into scope and timing.
5. What identifying labels and tags will you seek to use in Tests and Survey Questions? For example, question ID, tags, and any classification of your questions will be supported. We can help here.

Process steps and when we will we discuss this

1. We will review current/legacy tests and surveys and map the requirements.
2. We will assist in import and setup of tests and surveys.
3. We will tour the existing capabilities to create and deliver tests and surveys.

Who should be involved

- Education team members and Authors/SME (Subject Matter Expert)
- Education team to provide the initial source content and manage content once in the test engine
- SME to author/edit tests/evaluations

Risks and issues to be aware of

1. Making sure we track the identifiers/descriptors for your questions to organize/track them.
2. Consider what level of report data is required for tests and surveys.

Artifacts to be created: Specifications doc that outlines key items:

1. Tests and settings, Surveys/evaluations and settings
2. Authors who need permission
3. Import questions

Also the following:

4. Set up of sample versions of migrated/repurposed content in new site
5. Conduct demo in key authoring features
6. Evaluate export and import function

Content

Brief description: the educational material and courses that populate the learning site.
Vision: Build a great plan to develop an ongoing path of courses and options

Key questions

1. What content formats are being used now and do we have source files to migrate?
2. What new content will be part of initial pilots and final (public) launch? Do we need to coordinate launch to align with these new courses?

Decisions, considerations, and thoughts

1. What are the audience's key education needs and topics?
2. What are required education activities that may drive activity to the portal?
3. What are the motivations to take educational content in this portal? Examples of motivations include: mandates due to professional requirements, changes in the profession requiring new skills, and to differentiate in a competitive workforce.
4. Are there "tracks" or paths that learners may follow to gain specialization or develop certain skills/certificates?
5. How will you organize the content in your site? Examples: by topics, specialties, delivery formats, focus areas, CEU count, and length.
6. What information do you have for your content description? Descriptions will help learners enroll in the courses. Keywords, course descriptions, authors/speakers, dates of creation, and other info will be helpful to the audience.

Process steps and when we will discuss this

1. Inventory current content and its condition (formats, age of content, portability)
2. Develop plan for migration and or repurposing/updating content
3. Develop a classification method (taxonomy) to organize content.
4. Suggesting "tracks" and paths for key items
5. Developing plan for taxonomy/classification of content and descriptions
6. Determine the education content and key titles that will drive the initial audience traffic.

Who should be involved

- **Education**: to define the current and future plans for content, including current state inventory of education items.
- **Marketing**: to help develop the descriptions and imagery for the content on your LMS.

Risks and issues to be aware of

1. Don't over-analyze your taxonomy - classifications can change and be updated any time.
2. Don't feel pressured to launch with a large library or content - quality over quantity!
3. Focus on tracks to help your audience envision paths that develop - this is more effective than a catalog of miscellaneous content.

Artifacts to be created: 1) user case 2) content inventory + recommendation doc. 3) taxonomy (classification) tips
What we need from you: access to sample content, any inventory of content, survey data from courses

Business Rules, CE, Certificates, Roles, Permissions

Brief description: key ways you grant CE, certificates, + how you observe Maintenance of Credentials
Vision: Setting the units of credit + rules that govern the education program + permissions for who accesses it.

Key questions

1. What types of Continuing Education will be tracked and what rules for award will be enforced?
2. What certificates need to be issued and for what courses and programs?
3. If you conduct Maintenance of Certification or Credential programs what are the requirements, renewal periods, and topics/subjects required?
4. Who will need access to the site as admins/staff/instructors and what rights will they need?
5. What learner audiences (members, students, institutional customers) will use the portal and what different experiences will they need? Pricing? Content?

Decisions, considerations, and thoughts

1. What policies need to be enforced on the longevity of CE programs and do expirations of CE on products need to be communicated to participants?
2. Do you require roles-based credit award? For example, do different profession types/roles get different credit amounts for the same course?
3. Do you allow self-claims and if so, do you auto-grant them and audit later, or require approval? What information do you require in the self-claim process?
4. What will you require to present on the learner transcript of courses and CE's earned?
5. What information is required on the certificates? We'll need to design certificates and insert information regarding the course, person, and other specifics.
6. Are there other specialized workflows that need setup related to education programming? An example could be Application processes for Certificate Programs

Process steps and when we will we discuss this

1. We will conduct reviews of your CE and certificate requirements and document a specification in requirements to ensure we help set up the CE units and assist in the Certificate design/setup.

Who should be involved

- Education and anyone tied to CE rules that's outside of Education.
- Education to inform us on requirements for what goes into the certificate fields.
- Marketing to provide requirements on the design/look of the certificate templates

Risks and issues to be aware of

1. Ensuring that CE units are properly assigned to each educational product/course.
2. Ensuring that CE expirations are set properly.
3. The different learning audience types should be defined and detected by the system that handles login.

Artifacts to be created: 1) Specifications doc of roles, rights, CE types. 2) Certificate template(s) + setup
What we need from you: documented CE/Certification rules, Requirements for earning credit/certs, other.

Branding, Look & Feel "the presentation"

Brief description: Collaborating on the design of the learning portal.
Vision: Make the learning portal a seamless tie-in with your brand and web presence, while ensuring an intuitive, user-friendly navigation.

Key questions

1. What style guides and branding documents are available to serve as reference?
2. What graphic elements can we use for the catalog items as icons and product images?
3. What labels and text will you require for the pages of the portal you will enable: dashboard, catalog, grades, and other pages?
4. Will you require a "vanity" URL that customizes the web site address you own or will purchase?

Decisions, considerations, and thoughts

5. What will be the layout of your dashboard - the landing place for participants who visit?
6. What "tiles" or "widgets" will be presented to the audience? Will any audience see something different than the other(s)?
7. Will there be any non-English users and what languages/cultures need to be supported?
8. Do you follow any accessibility guidelines or requirements for disabled or impaired users?

Process steps and when we will we discuss this

1. We will conduct tours of existing site designs and layouts.
2. We will show you key "tiles" / "widget" choices and document any custom needs (separate stream)
3. For advanced graphic customizations that are outside of current design options: We will develop rough mockups + an eventual HTML prototype of the desired design for your stakeholder review.

Who should be involved

- Education team leads to review tiles selection and layout.
- Marketing and Membership teams to define design and branding requirements.
- IT team members to configure any requirements for the "vanity URL" (e.g., learning.acme.org).

Risks and issues to be aware of

1. Non-English Language support will require translation resources if new content is introduced- specific to your organization - in areas of your portal, for example in tiles or general text outside of standard software interfaces.
2. Design requirements should account for mobile and smaller device screens and therefore should have a "responsive" setting to adjust to the screen size of the device. Designs that are not supportive with and don't comply to this requirement will be highly problematic.

Artifacts to be created: specifications document populated and prototype developed to cover:

1. Style, logos, and any graphic/layout configurations specific to any group/audience
2. Text and labels of key elements, tile locations, dashboard - with rough mockups/prototypes (as detailed in contract)
3. Custom tiles (widgets)

What we need from you: style guides, CSS, logos in the most web-optimized (high quality) formats

Customizations

Brief description: new features needed
Vision: design and develop client-specific features

Key questions

1. What features or reports have we identified as gaps that you require for Day 1 and future releases?
2. Is this feature critical or is it tied to historical decisions that may be reevaluated?

Decisions, considerations, and thoughts

1. What prioritization can you place on custom features to help release these new features in phases to help an agile pace?
2. What current documentation is available for your business-specific features that you seek to implement on the new YM LMS?

Process steps and when we will discuss this

1. We will conduct a gap analysis by reviewing current (legacy) LMS and education programs to compare them to the YM LMS.
2. We will develop specifications for all new features required.
3. When needed, a visual mockup and or prototype will be developed for new features required.
4. If custom reports are needed, sample data formats will be created.

Who should be involved

- Education team members
- IT to review any technology aspects of the feature
- Marketing team and support teams to discuss possible challenges with legacy features and opportunities to address them.
- Customer service reports and data on previous usage, including enrollments history and web analytics can inform us on possible opportunities to improve the experience for participants.

Risks and issues to be aware of

1. Most key functions are already offered in the platform - consider delaying must-have custom features until an initial release.
2. Avoid redeveloping complex business workflows: we've found many organizations face the challenges of previous decisions that instilled complexity into business workflows and procedure. They in turn seek to replicate those in new systems. It is worthwhile to conduct reviews of these processes and consider if they can be simplified or eliminated altogether.

Artifacts to be created: 1) specifications document explaining the feature needed 2) Mockups and or prototypes when applicable.

What we need from you: any documented feature specifications for custom rules, reports, features

Training and User Support

Brief description: building a plan to ensure seamless launch and high quality customer service
Vision: ensure that your organization is comfortable with the use of platform, and participants/learners have multiple support options when issues arise.

Key questions

1. What support levels will you seek from YM? Will you offer tier 1 (direct Learner support)?
2. What admins, staff, and faculty will need access to the LMS for various responsibilities?
3. Will there be separate teams developing content for the learning portal?
4. Will there be instructors that use the platform for conducting courses?

Decisions, considerations, and thoughts

1. What will be the process of supporting end-user issues? What escalation process do you have?
2. Will your organization handle first tier questions (end-user participants) or will YM?
3. Who will be designated contacts at your organization for support? We will populate the charter with this.

Process steps and when we will discuss this

1. We will review these questions and develop training and support plans
2. We will schedule various training within implementation to address these specific groups.

Who should be involved

1. Education to lead the requirements
2. Administrators, Staff, instructors, and other intended internal users who will go through training

Risks and issues to be aware of

1. Don’t compress training into one session. We will break training into smaller segments of no more than 1-2 hours to improve retention and engagement.
2. Be repetitive and break sessions over a period of time. To encourage improved retention, we will spread training sessions over time to repeat and strengthen knowledge.

Artifacts to be created: 1) Support plan for all user types 2) Training plan for administrators/staff

What we need from you: support team contacts and business process for escalation. Login access to your system of record so we can simulate the access of other participants.

Program Excellence

Brief description: the ongoing collaborative process to ensure success.
Vision: build in clear tracking and milestones to encourage a great, thriving program
Key questions

1. What ways will you measure your program's success? See thoughts under considerations below.
2. Will there be a discrete role + responsibility for someone to monitor the success of your program?
3. What key organizational milestones can we consider in planning to measure success and map to in scheduling future reviews? For example, board meetings are key events for which we can share snapshots of key status and progress updates: visual experience, sample content.
4. What systems/procedures are in place to track data that we need to measure success?

Decisions, considerations, and thoughts

What qualitative measures will you seek to measure impact? Key measures we'll help you track:

- **Logins**: visits/entrances into the portal
- **Launches**: entering courses and educational content
- **Enrollments**: signing up (matriculating) for a course/activity.
- **Completions**: completing the requirements of a course/test/activity
- **Grades/Pre-Post Assessment:** performance in educational activities
- **Certificates/CEUs earned**: count of certificates and CEU earned by learners.
- **Time on site**: the logged time and analytics will be tracked back to your analytics.
- **Satisfaction ratings with support**: we track all ticket satisfaction and will report them.
- **Analytics**: we will integrate with your Google Analytics or other Analytics package to track the web analytics: time on site, views, paths, devices and browser types, and other data.
- **Revenue**: if courses are sold, the data will be retained in the commerce system of record

Process steps and when we will discuss this

1. We will review these questions with you and develop a simple guide for your account manager.
2. The account manager will meet with you regularly on a monthly basis (for the first months after launch) and then quarterly and annually basis to compare metrics and performance, while also performing routine check-ins.

Who should be involved

- Education and Marketing teams should collaborate to develop an active plan to monitor these metrics + organization-specific items to measure the success of the program. Data from the LMS can report into key systems of record for further analysis including your analytics package (e.g., Google, Adobe) and Business Intelligence software (e.g., Tableau, Domo, et al).

Risks and issues to be aware of

1. We believe in continuous "health checks". When monitoring, and measuring regulations for the program in question are inconsistent or neglected, it's easy to lose sight of the overall objectives. Most organizations intend to pursue these steps but don't follow through and dedicate resources to this pivotal aspect of the program's health and longevity.

Artifacts to be created: 1) Project Charter updated with metrics and success plan 2) ongoing monitoring and reports from YM team

Forward looking, well balanced, agile leader