eLearning Preparation Questionnaire

> **The following represents the questions that we normally try to answer either before we write our proposal or after project award during the first phase, called Discovery. The more we know before we write the proposal, the more accurately we can assess your needs and the more precise will be our schedule and pricing proposal. Whatever is unknown until the Discovery phase will be captured during that stage when we create the Learning Strategy.**
>
> **If there are a great many unknowns, we can price out the Discovery phase first and then price out the rest after the items become better defined. If much but not all is known before the Discovery phase, we can place assumptions on which we mutually agree in the proposal.**
>
> **In other words, the more you can provide to us, the better, but don't worry about anything you do not know at the moment. Just let us know what you may already know regarding predetermined requirements. Don't spend too much time on this – just fill in what you know. Thank you!**

Communication

Who will be our main point of contact? This should be the person who has final decision-making responsibility on open questions.

What are your preferred methods of collaboration?
☐ E-Mail ☐ Instant Messaging ☐ Web conferencing ☐ In person meetings ☐ Phone calls _____ Your preferred phone number for technical questions _____

In which time zone are you?	
What times of day do you prefer to talk?	
Proposal due date?	
Estimated project start date?	
Desired project completion date?	

Terminal Learning Objective

Please state the overall objective or goal that should be reached by learners when they will have completed the course. Example: *The learner will be able to determine the steps to take in the correct order when checking for malfunctions in an air-conditioning unit.*

Course Structure

Please state the overall objective or goal that should be reached by learners when they will have completed the course.

Example: *The learner will be able to determine the steps to take in the correct order when checking for malfunctions in an air-conditioning unit.*

Supporting Objectives

Are there smaller objectives that support the terminal learning objective? These are often called enabling objectives.

Examples:
 1. *The learner will first check if power is reaching the unit.*
 2. *The learner will check filters and other airflow items.*
    Etc.

Content

What is the content to be taught?	
How familiar is the learner audience with the content?	

Media Use

What type of media do you believe should be used in this course?	☐ 2D Images ☐ 3D Images ☐ 2D Animations (Objects Moving) ☐ 3D Animations (Objects Morphing) ☐ Audio Narration, Male ☐ Audio Narration, Female ☐ Music / Sound Effects ☐ Photography ☐ Digital Videos

Interactivity

Indicate at right the different types of interactivity and approaches you believe should be used in this course.	☐ Multiple-Choice ☐ Short Text (Fill-in-the-Blank) ☐ Drag and Drop ☐ Matching (Left and Right Columns) ☐ Surveys ☐ Soft Skills Simulations ☐ Software Simulations ☐ Roll over / Exploratory screens ☐ Zoom in / out ☐ Place items in sequence ☐ Other _____

Learner Audience

Education level *What is the minimum education level for learners? (e.g. high school graduates)*	
Languages *What languages must be supported among the learner audience?*	
Geographic Locations and Dispersal *Where are the learners located? In how many separate locations*	
Availability *Please describe when learners will access the learning. For example, will the learners have dedicated time to take the e-learning or will they be taking them at their desk between other duties?*	
Job Roles *Please describe the roles that learns occupy while on the job. For example: lead engineer, quality engineer, etc.*	
Estimated Size of Learner Population *For example, 50,000 learners*	

Progress Tracking System

Name of tracking system	
Version of tracking system	
SCORM compliancy version	
xAPI (Tin Can)	
Other important details	

Progress Tracking System Do you have a tracking system (such as a learning management system, LMS) in place or will you have one in place by the time the e-learning is due to be ready? If so, please include the information to the right.	
If you do not have a tracking system and have no plans for one in the immediate future, do you have another system in place for tracking progress to which the e-learning must send information? If so, please provide details.	
If neither of the above is true, do you want us to create a progress tracking system?	
Information to be tracked The more information that needs to be tracked, the more time it will take to build the tracking and the higher the price. However, it is much less expensive to build progress tracking in at the beginning rather than try to include it later. It is best to include what you know now to be required and what you believe will be needed in the future and avoid including any tracking below that you do not believe will ever be required of the course.	☐ Lesson Completion / Course Completion ☐ Quiz Results (Pass / Fail) ☐ Test results ☐ All interaction results 　*Include:* 　☐ Answers to each interaction 　☐ Length of time in each interaction 　☐ Number of attempts to each interaction 　☐ Result (*Correct / Incorrect / Did Not Try*) for each interaction

Authoring Tool

Is there an authoring tool that will be required to be used to create the learning?	If so, what is it?	
	Which version of the tool?	

Desired Average and Total Learner Seat Time

The average seat time refers to the amount of time that the average student will take to go through the entire course. Include glossary term items and other ancillary items that will be included in the course.	Average seat time for the course
	Average seat time for each lesson
	Total seat time if *everything* is seen and all interactions are taken.

Learning Materials

Is this course based on any of the materials on the right which already exist?	☐ Classroom instructions
	☐ Existing manuals
	☐ E-learning
	    Is the source code available? _____
	    What tools were used to create the
	    previous e-learning (include versions)?
	    _____

Check all items on the right which exist at this time and from which it is possible to obtain source material.	☐ Classroom teaching guides ☐ Manuals ☐ Images ____% of total images to be used ☐ Videos ____% of total videos to be used ☐ Audios ____% of total audio to be used
What materials may we review during the proposal process?	

Predetermined Methodologies

Do you have any predetermined methodology or ideas regarding the learning strategy?
 	
Would the audience be open to these ideas?
	☐ Gaming elements?
	☐ Scenarios? _____
	☐ Storyline? _____
	☐ Interaction types
	   ☐ Text entry
	   ☐ Multiple choice
	   ☐ Drag and drop
	   ☐ Click
	   ☐ Date/Time stamp
	   ☐ Latency
	   ☐ Score
	   ☐ Correct response
	   ☐ Student response
	   ☐ Attempt number
	   ☐ Pass/Fail
	   ☐ Possible points
	   ☐ Other _____

Minimum Learner Machine Technical Specifications

What are the minimum technical specifications on learner machines? Fill out all you know at right.	Operating systems and versions	
	Browser and version (if applicable)	
	Minimum Internet speed	
	Hard drive space available	
	Memory	
	Access to system folders	
	Flash player version	
	HTML5	
	Other	

Delivery Methods to Support

Which of the delivery methods to the right need to be supported?	☐ HTML5
	☐ HTML5 Responsive Design
	☐ Flash
	☐ CD-ROM
	☐ DVD-ROM
	☐ Mobile Devices
	   ☐ iOS
	      ☐ iPad (models _____)
	      ☐ iPhone (models _____)
	   ☐ Android
	      ☐ Pads
	        (models _____)
	      ☐ Smartphones
	        (models _____)
	☐ Webinar (synchronous)

User Testing

How actively would you and/or the client be involved with the user testing?	
How much user testing will we be involved in after delivery?	

Subject Matter Expert Availability

How much time can subject matter experts be made available during the Discovery phase? Indicate hours per week if possible.	
Will there be one subject matter expert who will make final decisions on all subject matter-related matters?	

Review and compliancy issues

Please describe what reviews will be needed before, during and after the project.	
Will the course need to be ADA Section 508 compliant? If so, describe at what levels.	
Other review and compliancy issues?	

Milestones

What project milestones would you like us to include in our proposal?	

Marketing

We normally provide a 10% discount when we are allowed to market the end results and our relationship with the client. Will this be possible in this case?	

Budgeting

If you have a budget in mind that you would like to share with us, we can try to cater our proposal to fit within your budget. If you would like to share that, please state it here.	
Given the anticipated budget, what elements of the e-learning to be developed do you consider the most vital?	

Thank you very much!

If you have questions, please write me at joe@elearningjoe.com or call me at 703-927-9437.