



ELeaning Readiness Assessment™



www.researchdog.com

220 East 63rd Street, MD 10B
New York, NY 10021
Mobile 415.722.2276
Office 212-838-5715

2001 Pierce Street
San Francisco, CA 94115
Mobile 415.722.2276
Office 415.928.4364

This eLearning Readiness Assessment was created by Samantha Chapnick, MA independent of any vendors or sponsors. It is an objective tool designed to facilitate the creation of learning programs that involve electronic delivery. Ms. Chapnick holds an MA in Instructional Technologies, is an Adjunct Professor at SFSU teaching Needs Assessment, and has developed learning programs that involve electronic delivery for over 8 years. She has a monthly column in ASTD's Training & Development magazine, writes regularly for several education, training & dog publications, and can be easily rented for speaking events.

Her clients include Chase Manhattan Bank, Cisco, Autodesk, The Learning Company, Jay Levinson (Guerrilla Marketing), the Oakland SPCA, and various small firms you have never heard of but who are doing really cool things.

This instrument is a part of the assessment process at over 200 organizations around the world including half of the Fortune 100. To name a few:



SmartForce

SOUTH AFRICAN BREWERIES plc

to INTELLINEX an eLearning venture of Ernst & Young



UNION
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Instructions

The assessment is divided into 8 sections corresponding to the e-Learning Readiness factors. Within each section are questions designed to stimulate thought on a particular aspect of that factor. After performing adequate research to make an informed choice, select only one response for each question, making sure the response is the one most representative of the reality of the situation. The instrument is designed to be completed in accordance with your unique situation. In other words, respond to any of the questions without regard to the order in which they appear below.

When you have selected a response for each question on the assessment, add up the points for each section. For every checked response, there is a number in parenthesis (“point value”) to the right of each response. Add up the point value for each section and write that number in the space allotted at the bottom of each section.

When you have completed all the questions, combine the points for each section to obtain a cumulative score.

Please provide any comments, unbridled praise, harsh criticisms, or any other feedback to Research Dog at schapnick@researchdog.com.



Psychological Readiness

- Has the Target Participant Population(TPP) been assessed for learning style?..... Not Planned (3)
 Included in Plan (2)
 Completed (1)
- Are the TPP's learning styles well suited for e-learning?..... Yes (1)
 Most (2)
 Some (3)
- Are focus groups/interviews or other assessment methods planned (or have they been conducted) with the TPP to determine their attitude towards e-Learning?..... Not Planned (3)
 Included in Plan (2)
 Planned & completed (1)
- What has been the response of the TPP to any previous transitions such as reorganizations, mergers, management changes, conversions to computer systems, and so on?..... Most embraced it (1)
 Most accepted it in time (2)
 Most resisted (3)
- Where would you place most of the TPP's on Michael Porter/Geoffrey Moore's Technology Adoption curve?..... Most are innovators/enthusiasts(2)
 Most are early adopters/visionaries (1)
 Most are pragmatists (3)
 Most are conservatives (4)
 Most are skeptics/luddites (5)
- What has been/will be the involvement of the TPPs in the planning and design process?..... Most directly involved (1)
 Most opinion leaders involved (2)
 A few representative members involved (3)
 None are involved (4)
- How would you describe the sociability of the TPP?..... Most enjoy working alone (1)
 Most like to work in groups (2)
 Most prefer human interaction to computer (3)
- What personal "high-tech" devices do the majority of learners personally own? (Do not include those provided by the employer)..... PDAs/hand held devices (1)
 Laptops/ Home computers (2)
 Cell phones/pagers (2)
 None (3)
- Who does the TPP usually expect to pay for education?..... Government usually pays all costs(2)
 Company usually pays all costs (2)
 Participant usually pays most costs(1)
 Third party (i.e. scholarship) pays most costs (3)

Psychological Readiness Score

Combine the point value corresponding to your responses, place here..... → -----



Sociological Readiness

Has a pilot project been included in the plan or completed?.....

Pilot completed (1)
 Included in plan (2)
 Not planned (3)

Have managers been heard to say anything similar to the following:
a. "This is great! They can take classes in their free time or at home!"
b. "I just want to make sure they don't spend all day on the internet or sending emails"
c. "As long as it does not affect their productivity".....

Nothing similar to this (1)
 Something similar to one phrase (2)
 Something similar to most phrases (3)

What level of formal education has the TPP reached?.....

Most, high school diploma (3)
 Most, some college (2)
 Most, college degree (1)

How is the TPPs currently monitored or appraised? (Accountability).....

Anonymously (2)
 Not appraised or No records maintained (3)
 Records kept confidentially in HR dept (2)
 Records kept confidentially with manager/dept (3)
 Emails, and internet use monitored (2)
 Phone calls monitored and recorded (1)

Has the creation of an appropriate physical workspace been included in the plan or created?...

Included in plan (2)
 Created (1)
 Not planned (3)

What is a typical response when a member of the TPP takes initiative (i.e. doing something beyond her job description or instructions)?.....

Tangibly rewarded with bonuses or awards (1)
 Nothing (2)
 Jokes or negative comments are made (3)
 Managers respond negatively (3)

Is there a noticeable tendency to embrace homogeneity?)?
(i.e. in dress, hobbies, possessions, conversation)

Yes, much overlap between individuals (3)
 50/50 (2)
 No, the group is very diverse in many ways (1)

What has been the response of the TPP when a member masters a new technology?.....

Praise and celebration (1)
 Excitement & desire to learn from her (1)
 No response (2)
 Derided or embarrassed (3)

Sociological Readiness Score
Combine the point value corresponding to your responses, place here..... →



Environmental Readiness

Are there any large external political barriers that need to be surmounted before any part of the e-Learning program can be implemented (for example unions?).....

- Yes, numerous large barriers (3)
- Yes, some large barriers (2)
- Yes, a few large barriers (1)
- No barriers we haven't surmounted in the past (1)

Are there any large external legal barriers that need to be surmounted before any part of the e-Learning program can be implemented?.....

- Yes, numerous large legal barriers (3)
- Yes, some large legal barriers (2)
- Yes, a few large legal barriers (1)
- No legal barriers we haven't surmounted in the past (1)

Does the target audience include people who speak significantly different languages?...

- Yes, many speak different primary languages (3)
- A few speak different primary languages (2)
- Most speak the same 2nd language fluently (2)
- A few speak the same 2nd language fluently (3)
- Most speak the same primary language (1)

Does the target audience include people from significantly different industries?.....

- Yes(2)
- No (1)

What is the size of the target audience?.....

- Small division/group of customers/partners (1)
- Medium division/group of customers/partners (2)
- Large division/group of customers/partners (3)
- Many different divisions (3)

Where is the TPP located geographically?.....

- Most in one close region (1)
- Most in one country (2)
- Most in different regions of the same country (1)
- Most in different countries (2)
- Most dispersed across the globe (3)

Does your gut instinct tell you the time is right for e-Learning?.....

- Yes(1)
- No (2)

What is the organization's attitude towards training?.....

- "It's an unnecessary cost center" (4)
- "It's a necessary evil" (3)
- "It helps us indirectly" (2)
- "It is a critical part of our success" (1)

Has the organization recently undergone (or is it about to undergo) a major merger or acquisition that will substantially alter it's processes or resources?.....

- Yes (2)
- No (1)

Does the organization currently have a dedicated Training department?.....

- Yes, a large one (1)
- Yes, a small one (1)
- No (2)

What is the revenue model of the planned elearning initiative?.....

- There is no model yet (3)
- A cost funded by HR (3)
- A cost funded departmentally (2)
- A source of revenue (1)

Environmental Readiness Score

Combine the point value corresponding to your responses, place here..... →



Human Resource Readiness

- Does the vendor have the people in place to create and support your project?
 Yes, well staffed, Impeccable service (1)
 Yes, reasonably staffed, good service (2)
 No, poorly staffed or poor service (3)
- Is there an e-Learning champion on board who has both the informal and formal power to make the project happen?.....
 Yes (1)
 No (2)
- Is there a help desk or tutor available for TPP?.....
 Yes, immediately available to TPP (1)
 Readily available to TPP (1)
 Available with a wait (3)
 No dedicated resource (4)
- Does the plan include training people to use the system?.....
 Not yet, but on the radar screen (2)
 Yes, detailed plan, resources allocated (1)
 Yes, but resources are TBD (2)
 No (3)
- Does the vendor (or your internal department) have adequate human resources earmarked to provide user training on the new system?.....
 Yes, surplus resources (1)
 Yes, adequate resources (2)
 No, but currently staffing up (3)
 No (4)

Human Resource Readiness Score

Combine the point value corresponding to your responses, place here.....

Financial Readiness

- Has a budget appropriate to the endeavor scope been provided?.....
 Yes, exceeds needs(1)
 Yes, meets needs (2)
 Budget provided but inadequate (3)
 No budget yet (4)
- Have Macro objectives demonstrating how e-Learning will help the organization reach it's current and near-future goals been created?.....
 Yes, effective and convincing (1)
 Initial ones created, need improvement (2)
 None created (3)
- Did the goals originate with the CEO or another high-influence individual?.....
 Yes(1)
 No(2)
- Are other technological initiatives being implemented due to their cost-saving potential (i.e. web conferencing)?.....
 Yes, many (1)
 Yes, some (2)
 Yes, very few (2)
 No, this is a first (3)

Financial Readiness Score

Combine the point value corresponding to your responses, place here..... →



Technology Readiness

- Does the target audience know how to type?..... No(2)
 Yes (1)
- Does the TPP have the basic internet connectivity skills?..... Yes, most use aol (2)
 Yes, most know xml, java, etc (1)
 Yes, most have an ISP for home (1)
 No (3)
- Does the TPP know the basics of how to use a computer (i.e. Save, Open Folders, launch programs)? Yes (1)
 No (4)
 Some (3)
 Most(2)
- How long have the TPPs been using computers?..... Less than 1 year
 1-2 years (3)
 2-5 years (2)
 5+ years (1)
- Has your prospective vendor ever created exactly what they are creating for you before?..... No(2)
 Yes (1)
- If the vendor has created the system before, have you contacted another client for a reference? Yes, great reference (1)
 Yes, decent reference (2)
 Yes, lukewarm reference (3)
 No (3)
- Is research and information discovery a regular part of the TPP's current job?..... No, their jobs are mostly routine (3)
 Yes, often need to solve simple problems in a group (2)
 Yes, often need to solve complex problems in a group (1)
 Yes, frequently need to solve complex problems by themselves (1)
- What do the TPPS typically use their computer for?..... Don't have/use computers (4)
 Games (3)
 Interactive/Collaborative functions (i.e. email, chat rooms)
 Office programs + the above (1)
- Is the TPP familiar with computer terminology and jargon?..... Most use frequently (1)
 Most understand, but don't use (2)
 Most don't understand and don't use (3)

Technological Aptitude Readiness Score

Combine the point value corresponding to your responses, place here..... → _____



Equipment Readiness

If a portion of your TPP requires special technology equipment (i.e. a TTD machine, bigger screen resolution for reading challenged) has it been planned, or provided and is it available?

- Not Available/Not provided (3)
- Planned (2)
- Already provided (1)

Do the TPPs have better than adequate equipment?.....

- No (3)
- When we get budget (3)
- Plan to receive it soon (2)
- Already have it (1)

Does the system require anything that is “on it’s way” but not readily available yet (i.e. broadband, high speed wireless access)?.....

- No, most elements exist(1)
- Most elements have been in existence for a while (proven track record) (1)
- Some we have, some are being developed (2)
- Most are yet to have widespread availability (3)

Does your facility have online access capabilities that EXCEED what is suggested by the vendor?.....

- Yes, far exceeds (1)
- Yes, exceeds moderately (2)
- Meets vendor requirements (2)
- No, does not meet vendor requirements (3)

If TPP expected to complete program from home, were arrangements made to provide equipment?.....

- Yes, all have superior equipment (1)
- Yes, most have adequate equipment (1)
- Arrangements completed (2)
- Arrangements not yet complete (3)

Has a plan been created that outlines the details of acquiring, maintaining, and upgrading equipment?.....

- Created, sign-off from all key stakeholders (1)
- Created, pursuing buy-in (2)
- Rough Draft Created (2)
- Not created (3)
- Not planned (3)

Where will responsibility for the equipment maintenance, purchase, and so on reside?...

- ASP model, entirely vendor responsibility (1)
- Parts in-house, parts w/vendor (2)
- Entirely in-house (3)

What is the price range of the equipment that is to be acquired?

- Very high (3)
- Moderate (2)
- Very affordable (1)
- No costs associated with equipment (0)

What are the payment arrangements for the equipment?

- None, no costs (0)
- Pay as you go (1)
- Pay monthly, no up front costs (1)
- Pay monthly, small up front costs (2)
- Very large up front costs (3)

Equipment Readiness Score

Combine the point value corresponding to your responses, place here..... →



Content Readiness

Does the curriculum involve a great deal of subjectivity and judgment calls (i.e. Diversity training), or is it fairly straight-forward and objective (how to screw in a light bulb)?.....

- Very subjective and discretionary (3)
- Advanced content subjective, intro is straight-forward (2)
- Objective and straight-forward (1)

To what format does the TPP's response to the subject matter lend itself?.....

- Rigid compartment(i.e. multiple choice) (1)
- Unstructured response, verbal/prose (2)
- Strictly quantitative (1)
- Open-ended opinion (3)

Is the TPP accustomed to learning this specific subject matter with a live instructor?...

- Always (1)
- Usually (2)
- Only exposed to elearning (3)

What are some of the characteristics of the existing content that you intend to port into elearning?.....

- Already chunked into small pieces (1)
- Already contains metatags and Learning Object format (1)
- Non-linear (2)
- Linear and/or one rigid/established teaching method (1)

Will competency assessment be required upon completion of instruction?.....

- Yes, for all (1)
- For some (2)
- No (3)

Is the subject matter meant to be personalized by the student?.....

- Yes, extensively (1)
- Yes, in a few areas (2)
- No (3)

Does the desired competency goal require improvement of motor skills (with the exception of typing)?.....

- Yes (3)
- Somewhat (2)
- Very few to none (1)

What phase of its lifecycle is the desired subject matter in?.....

- Not yet developed (1)
- Exists, just need to be ported (2)

How much of the subject matter is already in multi media format (i.e. audio, video)?

- More than 80% is multimedia (1)
- More than 50% is multi media (1)
- Less than 30% is multi media (2)
- Less than 10% is multi media (3)

How often does the subject matter change?.....

- Constantly (1)
- Frequently (2)
- Often (2)
- Very rarely (3)

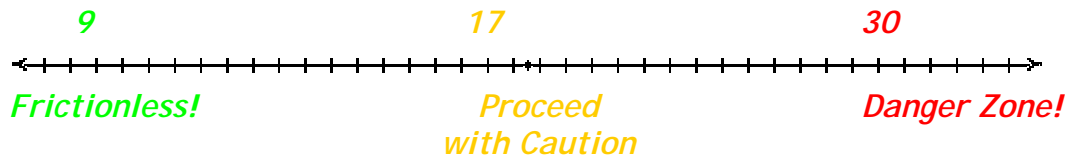
Content Readiness Score

Combine the point value corresponding to your responses, place here..... →



Score Guide

Psychological Readiness Score



Score 9-15: Enviably position to be in! You are unlikely to encounter more than a minimal amount of psychological resistance. Continue to keep the majority of people involved in the planning and development process and leverage the support of the most enthusiastic by asking them to play a key role in areas where there may be more difficulty.

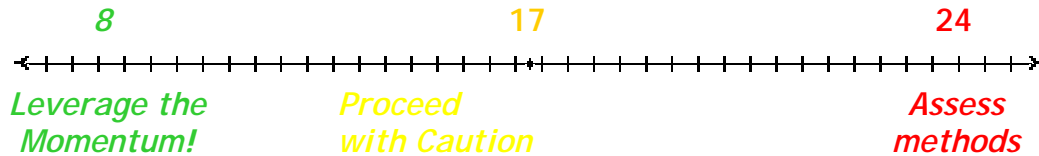
Score 16-24: Well, it could be worse. . . It looks like there will be some support and some resistance. The key tactics will be to carefully pinpoint and monitor the areas of support and areas of resistance in order to determine exactly what causes each reaction. Then, use this information to try to honestly and directly address the concerns of the potential resisters while instituting a compensation or recognition program for those who are active supporters.

Score 25-30: So, you're a glutton for punishment, eh? Of all the system factors, psychological readiness is the one that has the highest potential to sabotage your project. Unlike many of the other factors, such as Human Resource, Equipment or Financial readiness which can be remedied in any number of fairly straight-forward ways, improving psychological readiness involves a level of complexity and specificity, and an amount of time, that elevates its importance to your project.

At this point, the best approach is to warn key stakeholders of the tremendous levels of resistance and focus resources on converting at least some key opinion leaders into supporters. The resistance will not go away on its own: the more energy you can dedicate to decreasing it now, the less likely you are to deal with a much bigger problem later.



Sociological Readiness Score



Score 8-13: The force is with you! The power of the group is on your side, leverage it as much as possible.

Score 14-19: Focus in. In some ways the group dynamics are on your side, in other ways they are working against you. A good approach is similar to the one suggested for those scoring in the mid-range on psychological readiness: Focus some attention on determining what group elements are working in your favor and which may hinder your efforts. Dig deeper to figure out where change efforts will yield the greatest ROI.

Score 20-24: Up for a challenge? Changing group dynamics is significantly more difficult than changing individual psychological mindsets, and that, in and of itself, is no piece of cake. Serious interventions requiring the support of multiple stakeholders are advisable at this point. Some areas to focus on include reward systems, public relations or advertising campaign, and partnerships with groups that have different cultures. From a design perspective, make it a priority to determine which elements of your program will be integrated into the group most seamlessly, and direct your efforts towards having a roll-out that follows that order.

Environmental Readiness Score



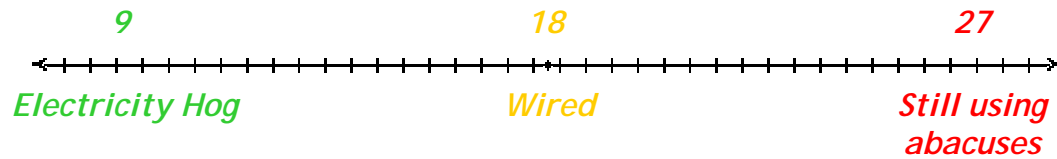
Score 11-16: Remember Murphy's Law. Unlike many of the other system factors, having a low score in environmental readiness does not mean you are home free and clear. By definition, this factor revolves around elements that are beyond your control—which means at any point in time an unanticipated change can occur. Keep your resources focused on areas that are of greater concern, but continue to monitor areas that are in flux.

Score 17-22: It could be worse. There are enough issues facing you to warrant shifting resources. Create a weighted matrix that can be used to generate a prioritized list of areas of focus. Look over your scores in other factor areas and see if there are any that can be de-emphasized in order to focus on the ones you just prioritized. Create a few contingency plans, and always monitor the area for new developments that can lubricate your efforts—or hinder them.

Score 23-30: Time for a reality check. Looks like you have some potentially large barriers facing you. Unfortunately, most of these issues need to be addressed by specialists (i.e. lawyers for legal issues, multi-lingual experts for localization, and so on). At the same time that you dedicate your efforts towards addressing these large issues, create as many contingency plans as is practical. Given that the locus of control for the environmental factor is outside your sphere of influence, you can never be too prepared.



Equipment Readiness Score

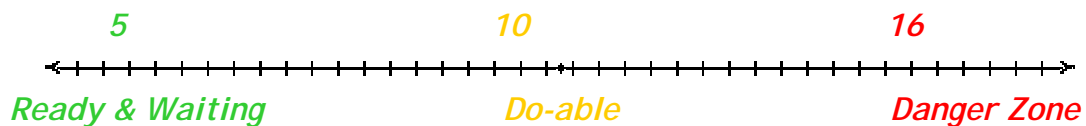


Score: 9-14: James Bond lookout! Given that you have every piece of equipment known to humankind, there is not much concern in this area. Given the dynamic and ever-changing aspect of technology you will need to stay abreast of developments that affect your project, but it seems that your only critical next steps are to send effusive thank you notes to your funders and a few gadgets to me!

Score: 15-21: Did someone say “bake sale”? Once again, the key is to assess and prioritize. Where does the greatest equipment pain lie? For which e-Learning efforts are you most likely to reap business rewards? Create a matrix plotting needs against outcomes to determine where to focus your efforts. You will still need to beg, but at least your cardboard sign will be more compelling.

Score: 22-27: Ain't too proud to beg. . . Now is the time to kick it into high gear. If you have not already done so, first determine how each stakeholder will benefit from the e-Learning initiative and then take action! Create a PR campaign, meet with your funders, beg all stakeholders, do whatever you can to convince the powers who hold the purse and human resource strings of the value of the e-Learning initiative. At the same time, see if there are interim ways to decrease dependence upon owning the equipment (i.e. use a vendor who rents or leases equipment, a company who provides subscription services or an ASP).

Human Resource Readiness Score



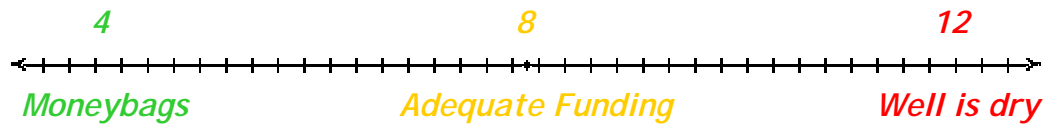
Score: 5-8: Start renting them out. Seriously, if all your resources are positioned just right, you can shift your focus away from this area. If you have extra resources, focus them on other areas in need of attention.

Score 9-12: Close to the borderline. Ask yourself where the gaps are and focus on getting the necessary support to fill in those gaps. If you let these needs slip, they will come back to haunt you.

Score: 13-16: Child labor is looking good around now. You are in the danger zone. It is the time to make some tough decisions and, if necessary, to rethink your plan. While it may appear that e-Learning will reduce your need for human resources in the long run, in the short run your reliance on human assistance will increase. If you have not done so already, map your human resource/competency needs on top of your project timeline, and prioritize according to the “bare minimum” needed at each stage. Develop a plan of action that focuses on efforts that can be done to rally support for obtaining human resource attention. Then go into negotiation mode—do whatever you can to get those resources!



Financial Readiness Score



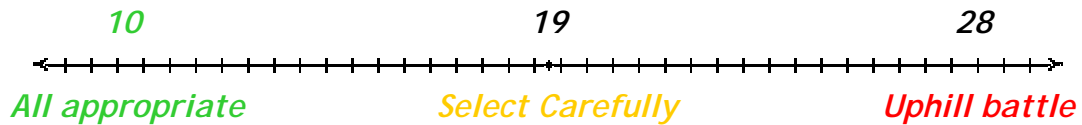
Score: 4-6: We're in the money. Lucky you. Keep providing status reports or doing anything else that makes the financial stakeholders feel involved and reassures them of the soundness of their decision to fund your initiative.

Score 7-9: Doing without. The cycle time from identification of financial need to receipt of funds is considerable. Now is the time to streamline your initiative. Make sure you are eliminating those areas that are not critical, or which can be added later, after the initiative achieves a few victories. For the essential elements where funds are still needed, develop a conservative timeline and plan (with numerous funding options) and act on it as soon as possible. The two biggest mistakes you can make are 1) relying on one source for all your funding needs and 2) waiting until it is too late. Take action now, before it becomes a crisis.

Score 10-12: Macaroni & Cheese, anyone? As with human resources, the prevalent misunderstanding is that it requires less money than traditional classroom instruction. While this is often the case in the long run, initially the investment can be higher. If the stakeholders are not providing the funds you need, or if the goals did not originate with a member of executive staff, start from step one: Make it a priority to clearly communicate how the e-Learning program will directly benefit the business by achieving macro level targets. If you still do not obtain the budget you need, its time to think about doing a pilot project and saving the bigger roll-out until there is stronger support from those who hold the purse strings.



Content Readiness Score



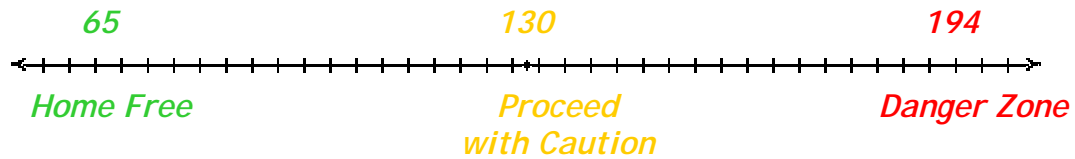
Score 10-16: Click your heels twice and say... You are lucky that your content is so appropriate for e-Learning. Now the decision needs to be made which content for which delivery method, and in what order. Engage the appropriate stakeholders and an Instructional Designer who has experience developing engaging and effective e-Learning in prioritizing the content. Once a list is made, develop a matrix of content and e-Learning method. Be sure to take into account all the other factors in the readiness assessment, as they should also play a key role in the method you select.

Score 17-23: Choices, choices. There are such a wide variety of e-Learning delivery formats that most content could fit into some format or another. However, success will be more likely if you select the content that will most directly impact the business objectives and then determine what format it should be in. If the best format is NOT e-Learning, see the suggestion below.

Score: 24-28: And you are doing this because...? Hmmmm. It doesn't seem that your content is really driving the e-Learning initiative. If after getting this score, you still think your content is, in fact, well-suited to e-Learning, than the best advice we can give is to be sure and work closely with an instructional designer who is skilled in developing effective and engaging e-Learning. If you agree your content is not well suited to e-Learning, but are still developing an initiative, the best approach is to find a necessary competency that is not currently being addressed by any instructional method, and that is well-suited to e-Learning. Starting from scratch with that curriculum is more likely to lead to success than retrofitting content that is ill-suited to elearning.



Overall eLearning Readiness Score



Score: 65-89: What are you waiting for? Well, if you aren't the envy of every learning professional alive today. An overall score this low means you have much more flexibility and choice. Given the ideal system surrounding your initiative, you have considerable leeway in determining what methods to use, when to introduce each one, which business objectives to target, and so on. You also have the luxury of making a few mistakes without derailing the project.

However, what you DO NOT have is the luxury of inertia. Even in an ideal situation, there are always things that can and will go wrong. Continue monitoring the factors that can be most impactful to your project, and continue to plan as far in advance as possible.

Score 90-160: It could be worse. You could have scored in the red zone. Most e-Learning projects fall somewhere in this zone. The best way to proceed is to carefully dig deeper into each factor, trying to pinpoint exactly what issues are cause for concern, and which advantages can be magnified. And then modify your plan to account for/leverage those areas. It is important to bear in mind that you do not have a significant margin for error. Which is to say that whatever factors are within your control should be addressed early and often, and whatever is out with your control should be carefully and frequently monitored.

Score: 161-194: Red flag time. Take a moment to re-evaluate your goals and objectives, asking yourself if e-Learning is really the best way to accomplish them. If the answer is yes, select your methods and introduction order very carefully. Your situation is so sensitive any issue that might normally be insignificant can easily become magnified into a showstopper. One of your first actions should be to alert relevant and influential stakeholders to the risks you are facing, and to enlist their support. A few of the numerous many possible next steps you might take:

1. Take the time to pinpoint and prioritize the areas of concern. Create a plan to minimize or eliminate the highest 5 or 10.
2. Switch your implementation plan to introduce only those methods that will be least intrusive and different.
3. If you have not already created at least one contingency plan, do so now.