e-Learning

Content Development Competencies

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1.0 Scope

This document outlines the content development engagement models and methodologies of Metalearn. It covers the development models and its details, instructional design methodology, and Metalearn’s approach to risk management, quality assurance, and project management. The intent of this document is to enrich the understanding of Metalearn’s development capabilities and build the ground for further discussion for a mutually beneficial engagement.

2.0 Metalearn e-Learning Development Model

Metalearn follows a modified ADDIE model for the development services. This is Analysis, Design, Development, Implementation and Evaluation. Though “Evaluation” is shown as the last block in this model, Metalearn treats it as parallel to the other four blocks.
### PHASE | TASKS
--- | ---
**Training Need Analysis** | focuses on identifying training objectives, learning requirements and client specifications to understand the scope of the course.
**Target Audience Analysis** | focuses on analyzing the audience of the course to ensure optimum participation of the learner based on the specifications laid by the client.
**Content Analysis and Structuring** | aims at breaking down the content into logical structure and identifying the flow.
**Setting up the Communication process** | between the client and project team, identification of points of contact and escalation points at both ends.

**Key Deliverables**
- Specification requirement document
- Project plan
- Resource allocation plan
Once the requirements are analyzed, the Instructional Design team develops *ID Strategy* document for the course, which defines the topics to be covered and the learning objectives to be met for each topic. This also includes the *Assessment Strategy* to test learner’s retention.

- **Visual Design and the Navigation Strategy** defines the look and feel, GUI options and Navigation options for the entire course.

- **Media Strategy** defines the mixture of graphical elements (images, illustrations, animations, simulations, videos, audio etc.) to be used within the course to sustain the learner’s interest during the course.

- **Technical Specifications Document** chalks out the technological aspects like – architecture, base engine requirements, resolution etc. for the online course.

- **Prototype** - Based on the above strategies prototype of the course is developed to help the customer experience how the actual course would look.

**Key Deliverables**
- Instructional design strategy document
- GUI and Navigational samples
- Technical Design Document
- Prototype
Based on the Prototype and other design documents finalized by the client, the process of storytelling is started. Screen by screen the textual content and graphical interaction is written down by the Instructional writers, based on strategy laid down by the Instructional Designers.

The storyboard goes in for an edit review to check for grammatical errors and an SME review to check for instructional consistency.

From the storyboard the voice over text is extracted and this goes for audio recording.

The graphics team produce the media elements as mentioned in the storyboard and integrate them with the audio.

The scripting team create the code for assessments, simulations or games if present in the online course.

The integration team is in charge of the creation of “digital assets” by integrating the graphics and codes with the “data player.”

These digital assets go in for an internal QA review (Graphics, Grammar, Voice consistency, Coding review, and Instructional Review).

After the internal QA, these digital assets go in for one round of bug fixes identified in the QA review.

After the bug fixes, they are submitted for SME review to check for the instructional consistency of the produced digital assets.

Before these assets are finally delivered they go in for the final round of bug fixing identified in the SME review.

Key Deliverables
- Storyboard document
- “Digital Assets” for the online course
• After individually testing of the developed assets, they are integrated and testing carried out, followed by a live system testing

• After successful testing of the course, Alpha Delivery is handed over to the client

• The Client’s feedback is incorporated, and changes are made, before the course is finally delivered

**Key deliverables**
- Alpha Delivery
- Final Course

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**Implementation**

After successful testing of the course, Alpha Delivery is handed over to the client. The Client’s feedback is incorporated, and changes are made, before the course is finally delivered.

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**Evaluation**

Metalearn believes in continuous evaluation during the development life cycle of a project. Strict quality checks are followed at various stages and internal evaluation is done at each phase. Client reviews are also done at regular intervals. The client feedback is incorporated in the project at each stage before proceeding.

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### 3.0 Metalearn Project Management

Metalearn appreciates its clients’ commitments to their customers, and to deliver the product with complete satisfaction, we have a team of experienced project managers, and very stable and time-proven project management processes, which ensures timely delivery of high quality training.

We strictly follow PMI’s framework as our Project Management Process.

To efficiently handle project management nuances and provide greater transparency to our customers, our Project Management application **METANET** helps in:

- Estimating and tracking effort spent on the project
- Scheduling and monitoring the project at a task level
- Analyzing resource utilization
- Tracking billing information
- Inputs to our HR systems
- Generating Project Status Report
- Facility for client to login to Metanet for the project status.
As soon as the project is kicked off, a Project Management Plan and a Project Schedule .mpp file is prepared, using Microsoft Project, and is shared with the client. This gives micro and macro level details on all the activity involved in executing the project.

Apart from such tools, Metalearn understands the importance of working closely with clients. Therefore, we include some information interchange meetings in our schedule. These meeting are:

- Project Kickoff Meeting
- Weekly Status Meeting
- Project Closure Meeting
- Impromptu Meetings

### Process Groups

<table>
<thead>
<tr>
<th>Knowledge Areas</th>
<th>INITIATING</th>
<th>PLANNING</th>
<th>EXECUTING</th>
<th>CONTROLLING</th>
<th>CLOSING</th>
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<tbody>
<tr>
<td>INTEGRATION MANAGEMENT</td>
<td></td>
<td>Project Plan Development</td>
<td>Project Plan Execution</td>
<td>Integrated Change Control</td>
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<tr>
<td>SCOPE MANAGEMENT</td>
<td>Initiation</td>
<td>Scope Planning Scope Definition</td>
<td>Scope Verification Scope Change Control</td>
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<tr>
<td>TIME MANAGEMENT</td>
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<td>Activity Definition Activity Sequencing Active Duration Estimating Schedule Development</td>
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<tr>
<td>COST MANAGEMENT</td>
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<td>Resource Planning Cost Estimating Cost Budgeting</td>
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<tr>
<td>QUALITY MANAGEMENT</td>
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<td>Quality Planning</td>
<td>Quality Assurance</td>
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<tr>
<td>HUMAN RESOURCE MANAGEMENT</td>
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<td>Organizational Planning Staff Acquisition</td>
<td>Team Development</td>
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<td>COMMUNICATIONS MANAGEMENT</td>
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<td>Communications Planning</td>
<td>Information Distribution</td>
<td>Performance Reporting</td>
<td>Administrative Closure</td>
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<td>RISK MANAGEMENT</td>
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<td>Risk Management Planning Risk Identification Qualitative Risk Analysis Quantitative Risk Analysis Risk Response Planning</td>
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<td>Risk Monitoring And Control</td>
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<tr>
<td>PROCUREMENT MANAGEMENT</td>
<td></td>
<td>Procurement Planning Solicitation Planning</td>
<td>Solicitation Source Selection Contract Administration</td>
<td></td>
<td>Contract Closeout</td>
</tr>
</tbody>
</table>
4.0 Metalearn Process Management

Metalearn has a well-defined process for the project execution. Process documents are made available to every employee to read and understand the process. Our Quality Management Group constantly updates these process documents. The lessons learnt in each project are documented and also converted into the best possible practices that can be incorporated to our process.

<table>
<thead>
<tr>
<th>Quality Management</th>
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<tbody>
<tr>
<td><img src="image" alt="Process Documents" /></td>
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<tr>
<td><img src="image" alt="Content Specific Documents" /></td>
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<td><img src="image" alt="Graphic Specific Documents" /></td>
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<tr>
<td><img src="image" alt="General Documents" /></td>
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<tr>
<td><img src="image" alt="Reference/Quality Manual" /></td>
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</tbody>
</table>
# Content Development Competencies

## Process and Documents

### 1. Initiating

- Project commencement
  - Management allot project to Project Manager
- Project Kick off meeting with client
- Internal Kick off meeting with team
- Project Manager to create appropriate folders in server and request sys admin to give rights to users
- Create project code and enter project property in MetaNet
- Raise Initiation Invoice with client

### Documents

- Projectcode_Projectname_General_Query.doc
- Projectcode_Projectname_client_kickoff.ppt
- Projectcode_Projectname_ddmmmyy_Invoice.doc
- Projectcode_Projectname_estimation.xls
- Projectcode_Projectname_Internal_ddmmmyy_MOM.doc
- Projectcode_Projectname_Network.doc
- Projectcode_Projectname_PCD.doc
- Projectcode_Projectname_proposal.doc

### 2. Planning

- Project Plan Development
  - Project Plan will have in detail the Scope, Time, Cost, Quality, Resource, Communication and Risk planning
- Project Plan will have assumptions and constraints, deliverable milestone, payment milestone
- Project Plan has to be approved by Management
- Project schedule – Using MS-Project tool or by Excel sheet

### Documents

- Projectcode_Projectname_matrix.xls
- Projectcode_Projectname_Projectplan.doc
- Projectcode_Projectname_schedule.xls

### 3. Executing

- Learners Need Analysis - LNA and Target audience Analysis - TAA document will be sent for client approval
- Conceptual design document will be sent for client approval
- Instructional Design Map document will be sent for client approval
- Design guidelines, checklist, Style guideline, specification checklist document will be base lined
- Development involves content creation or chunking, graphics, animation, simple and complex animation, audio recording, audio synchronization, data player development, structuring course to accommodate LMS, testing the course in LMS, LMS customization, course creation with DDA and 508 compliance, course creation with SCORM compliance.

### Documents

- Projectcode_LNA_TAA.xls
- Projectcode_Projectname_CDD.doc
- Projectcode_Projectname_ddmmmyy_Invoice.doc
- Projectcode_Projectname_guidelines.doc
- Projectcode_Projectname_IDMAP.xls
- Projectcode_Projectname_Review_Log.xls
- Projectcode_Projectname_type_ddmmmyy.doc

### 4. Controlling

- Scope deviation tracking. Raising Request for change with client
- Internal RFC due to team inefficiency
- All RFC has to be approved by management
- Project audit by Quality Assurance facilitator
- Weekly project status report to management
- Weekly team meeting and weekly client call

### Documents

- Projectcode_Projectname_ERFC.doc
- Projectcode_Projectname_estimation_ERFC.xls
- Projectcode_Projectname_estimation_IRFC.xls
- Projectcode_Projectname_IRFC.doc
- Projectcode_Projectname_MOM_ddmmmyy.doc
- Projectcode_Projectname_ncl.doc
- Projectcode_Projectname_PSR_ddmmmyy.doc

### 5. Closing

- Alpha, Beta and Gold master delivery
- Completion of warranty period
- Client survey document
- Knowledge base – Lessons learnt out the project
- Project Metrics document

### Documents

- Projectcode_Projectname_lessonslearnt.xls
- Projectcode_Projectname_metrics.doc
- Projectcode_Projectname_survey.xls.doc
- Projectcode_Projectname_type_ddmmmyy.doc
5.0 Client Feedback Management Process
### 6.0 Metalearn Delivery Matrix

<table>
<thead>
<tr>
<th>Stage</th>
<th>Metalearn’s Delivery</th>
<th>Client Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analysis</td>
<td>1. Learner’s Need Analysis Document LNA</td>
<td>Feedback/Signoff on the Analysis documents.</td>
</tr>
<tr>
<td></td>
<td>2. Target Audience Analysis TAA</td>
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<td></td>
<td>4. ID Map</td>
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<tr>
<td></td>
<td>5. Storyboard</td>
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<tr>
<td></td>
<td>6. Prototype</td>
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<tr>
<td>Development</td>
<td>7. All Modules Development Weekly Project Status Report</td>
<td>Acknowledgement</td>
</tr>
<tr>
<td>Delivery</td>
<td>8. Alpha Deliverable</td>
<td>Client Feedback verification/Final Signoff</td>
</tr>
<tr>
<td></td>
<td>9. Beta Deliverable</td>
<td></td>
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<td></td>
<td>10. Gold Master Delivery</td>
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</tbody>
</table>

### 7.0 Metalearn Client Engagement Model

Metalearn provides a variety of client engagement models to suit the customer’s outsourcing strategy. Metalearn brings the advantage of operating from India, with a strong domain expertise in developing e-Learning content and applications with a flexible onsite/offsite model, thereby providing the customer with highly cost effective high quality solutions.

We offer the following engagement models to our customers:

#### 7.1 Onsite Model

This model is suited for projects where the customer requires augmenting of skills and resources of his team at his location. The entire project team executes the project at the customer’s location. The customer is charged on an actual person month basis on mutually agreed pre-defined rates. In this model, the customer fixes the project scope, definition, and timelines.

#### 7.2 Offshore Model

In this model the entire project is executed at Metalearn’s development facility. In this model projects can be executed on **a Fixed Cost Basis or Time and Material Basis**. The project scope, definition and time line is prepared by Metalearn and submitted to the customer based on the Training Need Analysis. The project development starts once the customer has accepted the defined project scope and timelines.

In this model the Training Need Analysis/Functional Specification in the **Analysis and Design phase** can be carried out of the client site. Sometimes the final **Implementation phase** is completed at the client site.

#### 7.2.1 Fixed Cost Basis

This execution model primarily suits customers with clearly specified requirements and well-defined project path. In this low-risk option, the customer pays a pre-negotiated fixed amount and the metalearn team ensures quality delivery of the project within a pre-scheduled time frame.
7.2.2 Time and Material Basis

Often, the scope, specification and implementation plans of an e-Learning project are not easy to explicitly define at the outset. Time and material-based pricing comes in handy here, as e-Learning projects that typically include integration of heterogeneous environments, exploratory attempts, etc. are difficult to define. The customer is charged on the actual time spent by the resources on a person month basis at mutually agreed pre-defined rates. These projects can be converted into fixed cost basis once the project requirements have been defined.

7.3 Onsite/Offshore Model

This model is more suited for long term projects where course content is complex and unique. In this model a small team is onsite for the entire duration of the project. Usually this team would comprise of an Accounts Manager, Instructional Designers, and Subject Matter Experts. This team works as a bridge between the customer and the entire project execution team, which is based offshore. This model gives the customer better control over the project. In most e-Learning projects, the Subject Matter Content and the Instruction Design Strategy are the most contentious issues. With Instructional Designers being onsite, the customer needs are better understood and the changes, which the client needs, are better managed.
8.0 Dedicated Development Centre

A Dedicated Development Center (DDC) is located outside the client's premises, solely engaged in developing, testing and deploying software solutions and applications, most often in a country outside the client's country.

The purpose of a DDC is to let the clients focus on their core value competencies, take advantage of Metalearn's technological expertise, and dramatically reduce the expenses. This has proven to be a successful delivery model for providing clients an extension arm for their engineering facilities. It works as a combination of onsite and offshore model to clients.

For companies, departments, and programs lacking the time or resources to build their own DDC, Metalearn offers dedicated infrastructure and human resources within an established, India-based facility.

These facilities can be managed by Metalearn or by the customer or can also be operated on a BOT (Build Operate Transfer) basis.
9.0 Metalearn Content Development Organization Chart

The image shows a flowchart depicting the Content Development Team Chart, with various roles and positions, organized hierarchically. The chart includes sections for Project Management, Review/Test, Graphic Design, Visual Design, and Visual Programming, each with distinct roles and responsibilities.
10.0 Instructional Design Methodology

The instructional design methodology achieves a synergy between the user needs and tasks, the business needs of the organization, and the solution. Based on the business objectives, user needs and user tasks continuum, our design phase seeks to envision the solution to the requirements of your business. Stringent iterative test cycles are used to benchmark the design against the business goals before it is delivered for development of the proposed solution.

Audience and task analyses, together with competition analysis to identify how these tasks are being currently performed, leads to the product design and prototyping. The prototype undergoes testing and evaluation cycles to map to the proposed solution to the requirements. Next, the prototype moves to the large-scale production phase.

(Note: Though the audience, task, and competition analyses are taken into account to arrive at benchmark metrics, the development of prototype is not a mandatory step.)

With the framework that is prescribed by the ADDIE model, the instructional design and development methodologies cumulatively focus on delivering end-to-end solutions, beginning from the training need analysis to the design and development of the learning solution, and finally, customizing the solution for the delivery environment, implementation, and evaluation.

11.0 Risk Management Plan

With the understanding that no project is risk-free, we are committed to identify the risks early and analyze and address them appropriately through mitigation strategies and contingency plan. Our upfront, proactive approach differentiates us from reactive risk management strategies. We regularly re-visit the risk management plan to include new risks and mark current risks as closed.

Along with our Project Management process areas, we identify risk in each stage and mitigate the risk. Communication of issues to the client and constantly keeping in touch will facilitate smooth project development.

12.0 Quality Assurance Plan

Metalearn prides itself in taking iterative testing to ensure conformity between the deliverable and the performance requirements. Our quality assurance focuses on

- Defect prevention and tracking through review log sheet
- Mapping the output to the desired user experience/client specification
- Testing and reviewing
- Defect index calculation
- Monitoring and evaluating the QA processes
- Internal Audit for each project during its execution
- Raising of Non Compliance to Metalearn defined standards
- Closing of Open NC’s (Non Compliance).
## 13.0 Client Communication Model

We believe that a key element of managing relationships with clients is efficient handling of the client communication process. We have a number of practices in place to ensure that clients are kept well informed of the project status.

This is achieved by using a combination of the following:

- Weekly client status reports
- Regular conference calls and Instant Messenger chats
- E-mail and physical meetings.

Metalearn realizes that communication is a key area of concern for our clients in different time zones, which is why Metalearn project managers and project teams are accessible even beyond regular office hours to help clients resolve critical issues.

<table>
<thead>
<tr>
<th>metalearn™</th>
<th>Client Communication</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly client status reports</td>
<td>Regular conference calls and Instant Messenger chats</td>
</tr>
<tr>
<td>Email and physical meetings</td>
<td></td>
</tr>
</tbody>
</table>

![Communication Methods](image-url)
14.0 Metalearn Change Control Management

Metalearn recognizes the near-inevitability of change, especially for long-term projects with a diverse set of modules ranging from skills to processes and procedures. Therefore, we have a planned approach to manage change with the objective of maximizing the collective effort of the people involved in the change. Whether it is in response to reactive (changes in the macro environment) or proactive changes, we typically follow the change management process that helps understand and incorporate the change efficiently.

A change request may originate either at the client end or at Metalearn. The requested change can be a result of either a change in the client’s requirements, or an outcome of a project improvement effort. After senior management has validated the proposed change, it is assigned a change process owner who is responsible for managing the change through its life cycle. The owner of the change request can either be a project manager or a senior instructional designer, depending on the nature of change. The change process owner begins by describing the proposed change and identifying whether the change is systemic, organizational, or procedural in nature.

During the review phase, we adopt the Pros-Cons-Implications (PMI) approach to analyze the proposed change. This includes a cost-benefit analysis for both the client and metalearn. If the change is complex, another cost-schedule-impact analysis is performed to determine the adverse impact if the change is not implemented. Finally, the results of all the analyses are reviewed to facilitate an informed decision. If there is any change in the scope or extra effort is required, an RFC (Request for change) document along with estimation sheet is prepared and sent to client for approval. On approval of the RFC, the process of making the changes will initiate.

Once the change process initiates, new processes or procedures that might be required for successful implementation of the change, are established. Any additional resources (technology, skills, and human resources) are gathered and finally the change is implemented. If required, the change is also reflected in the contract or any other baseline document as an amendment.

**Step 1:** During project execution, if there is a deviation from the defined scope, RFC (Request for Change) is prepared.

**Step 2:** The RFC has redefined scope and an estimation sheet, which includes the revised effort.

**Step 3:** RFC prepared will get Metalearn Management approval.

**Step 4:** The RFC is discussed with client for approval.