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Insight Guide

E-learning Stakeholder
Management

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Insight Guide

E-learning Stakeholder Management

In 20 minutes you will:

20 mins

- Understand the importance of stakeholder engagement
- Be able to create a staged stakeholder engagement strategy
- Be able to develop a stakeholder matrix
- Understand appropriate strategies for key stakeholders.

Overview

Successfully implementing an e-learning project is a complex process involving a range of stakeholders from senior managers to subject matter experts to IT staff to line managers and of course the learners themselves.

E-learning is often part of some form of change program such as a new system, new policies or new regulations. So it's best to think of an e-learning project as change project and manage it in a similar way.

Successful e-learning project definition invloves being clear about who your project stakeholders are, their role and likely involvement, and how you're going to manage them.
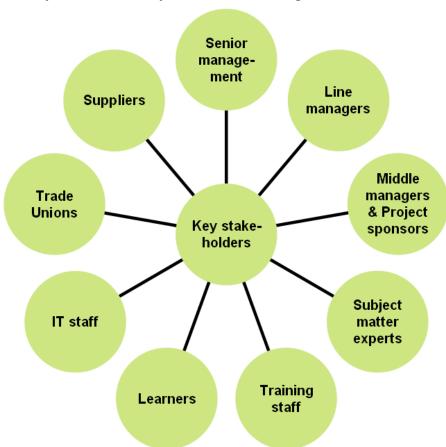
E-learning and change management

John Kotter, the Harvard Professor, specializes in the management of change projects. He has developed an eight step model for managing change successfully. His model, outlined below, can be useful for planning your e-learning project as a whole.

1. Create a sense of urgency
2. Build a guiding coalition
3. Create a vision
4. Communicate to get buy-in
5. Empower to succeed
6. Celebrate quick wins
7. Build momentum
8. Reinvigorate continuously.

In terms of getting stakeholders on board we are particularly interested in the second stage of the model: Building a guiding coalition.
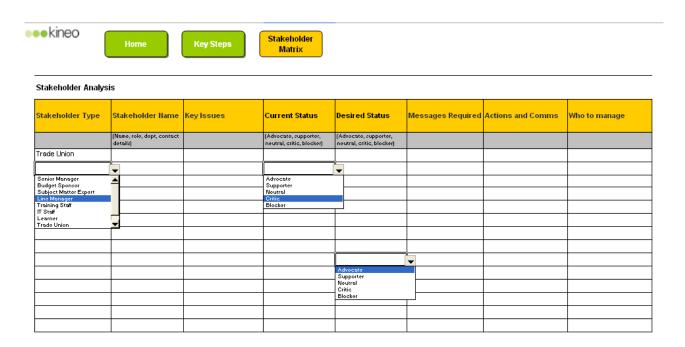
The key stakeholders may include the following:

Depending on the type of project, you might also consider including brand, HR, your customers and legal too.

Clearly if you're going to identify and engage a subset of these constituencies in an e-learning project, you will need to be organized.

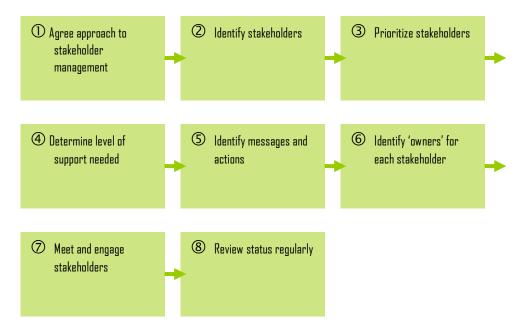# Kineo's e-learning stakeholder management model

E-learning is made more possible when you have pro-forma guides and tools to help you. To help make this stakeholder engagement easier, we've developed a rapid e-learning Stakeholder Management Tool in Excel:

You can work through each of the seven columns to help plan your stakeholder enagement strategy.

You can use this model to plan and develop a stakeholder engagement strategy for your project. The remainder of this Insight Guide provides support in the use of that model and should be read in conjunction with it.

We recommend the following steps to successful stakeholder engagement:

① Agree approach to stakeholder management	② Identify stakeholders	③ Prioritize stakeholders
④ Determine level of support needed	⑤ Identify messages and actions	⑥ Identify 'owners' for each stakeholder
⑦ Meet and engage stakeholders	⑧ Review status regularly	

These are included in a sample timeline in the 'key steps in SH management' tab in the tool. In this Guide we will walk through these steps and the tool you can use to follow them.

Step 1. Agree approach to stakeholder management

This is a question of scope. Are you going to appeal to a broad group, or focus on a few key players? What is your time budget for stakeholder management? What are the risks of not engaging particular stakeholders?

Also, you'll need to determine your method of communications and engagement. Email status reports, one-to-one meetings, virtual classrooms – you need to decide from among the several options.

Kineo insight: Build a coalition quickly

To implement change successfully it is necessary to have a strong coalition of people committed to the change. In the case of e-learning projects it is important to identify the key stakeholders, to identify why they are important and to develop an engagement strategy which will ensure they are committed to the delivery of your e-learning program.

In a rapid e-learning project, there is no time to miss out on a key stakeholder. The resulting change in objectives and rework would likely blow any rapid e-learning timeline.

Step 2: Identify stakeholders

Stakeholder type

It is important to consider each stakeholder type and whether they are appropriate to your project. The stakeholder types generally include:

- Senior management
- Middle management and project sponsors
- Subject matter experts
- Line managers
- Training staff
- Learners
- IT staff
- Trade Union
- Suppliers

Stakeholder name

Record the name, role and contact details for each stakeholder.

Step 3: Prioritise stakeholders

Kineo insight: 80/20 prioritization of stakeholder engagement

You may not have the time or capacity to manage every stakeholder to an equal extent. So it's important to focus your efforts on those top stakeholders that will make the greatest impact on project success. If there is one key stakeholder who is currently neutral, but is a highly influential senior manager, then it may make sense to concentrate your efforts to convert them to an advocate or champion, rather than address critics who have relatively less power or influence.

Use your judgment of the political landscape in your organization to determine how to focus your efforts.

Step 4: determine level of support required

Key issues

Here you can idenfity the key issues with this stakeholder. For example:

- Are they concerned about the effectiveness of the proposed learning?
- Are they concerned it won't integrate with other initiatives?
- Are they responsible for delivering on a performance target related to this learning? Are they responsible for controlling costs?
- Do they need to ensure compliance with legislation?

It is important to place yourself in the stakeholder's position and consider what issues they will consider important – as well as asking them, of course.

Current and desired status

It is important that you make a realistic assessment of the status of key stakeholders. The success of your project will depend upon creating a guiding coalition that can deliver all the elements of the project.

Stakeholders will probably hold one of the following five positions:

Advocate	**An active and vocal champion of the project** **Likely to benefit greatest from project's success**
Supporter	Will champion the project if opportunities arise
Neutral	Will neither endorse or undermine the project
Critic	Not supportive, and may undermine the project if opportunity
Blocker	Will actively look to impede project

It is important to make an assessment of the *current* position of each stakeholder and the *desired* position to make the project succeed.

It is not necessary to ensure that every stakeholder is an advocate. It might even be acceptable for some stakeholders to be critics but it is clearly essential that you have the right coalition of stakeholders advocating and supporting the project to succeed.

Step 5. Determine messages and actions required

In order to bring some stakeholders on board you need to consider the appropriate messages and arguments that you need to make. We have set out below some of the common messages and arguments that you might use to gather support for a rapid e-learning project.

1. Senior managers

Three key messages for senior manager engagement:

Alignment to objectives	**Senior managers are focused on achieving business objectives. They will focus on how rapid e-learning can help achieve these objectives - the business case for rapid e-learning. One argument is about speed and responsiveness to change. By adopting rapid e-learning you can increase the organisation's capacity to adapt and respond to change**
Speed of delivery	The rapid e-learning project enables you to deliver learning quickly to staff. It also enables you to update content quickly. Furthermore by using rapid development tools you can develop the learning cost-effectively
Return on investment	Senior managers, like budget sponsors, like to know that you have given serious consideration to the costs and benefits. Producing a Return on Investment analysis can be a very powerful way of bringing these sponsors on board. (You can use the Kineo ROI Spreadsheet model to develop such an analysis)

Kineo insight: Get them in the course and they'll champion it

Personal involvement of influential stakeholders in the content in a project, e.g. an opening quote, an photo, or a piece of audio can achieve two goals:

- It can lend authenticity to the materials
- It can motivate people to tell others about their involvement - and the e-learning.

So work to people's egos and involve them as you can in the e-learning content.

2. Budget sponsors

Budget sponsors, as indicated above, will often look for a return on investment analysis, so your key message must be a projection of return on invesment and/or a cost comparison of alternative methods, to show how you reached the conclusion that rapid e-learning was the best option.

3. Subject matter experts

Subject matter experts (SMEs) probably your key stakeholder – without them onboard and aligned to the project's objectives and approach, you're unliklely to get very far. Some key messages to deliver to move them closer to advocacy include:

Control over content	Many SMEs like to be able to author draft content directly as it gives them more control over the programme. It is common in rapid e-learning projects for SMEs to author directly into an authoring tool or into a template for importing into a tool later. If you are using an authoring too, you can emphasise the fact that this gives them more control and influence over initial build and subsequent updates – particularly in comparision to traditional bespoke e-learning projects.
Early views	You want SMEs to be able to see the end goal as soon as possible. We'd recommend showing lots of examples of how the e-learning could be, and ideally with success stories of how it's worked in other contexts. Also, plan on a very early prototype with a representative piece of content so they can see what it's going to look like – and you can find out early if you're on track.
Rapid output	SMEs are usually keen to pursue the route that will deliver informaton to the target audience the quickest. By emphasising e-learning's short development cycles you will gain their support.
Tranining and suppport	Ensure you provide sufficient training and support for any SMEs responsible for tool usage, if you're taking that approach. You do not want SMEs becoming critics or worse because of a technical challenge that they weren't prepared for.

For more on building rapport with subject matter experts, see our top tip on managing SMEs.

4. Line managers

Line manager support is critical for getting the e-learning used when it is deployed. Thus line managers should be engaged early in the process. Some key messages for line managers:

Less learner downtime, increased productivty	Line managers can be reluctant to lose staff time to training and hence e-learning should appeal in that it creates short pieces of training that does not require travel to a classroom session. E-learning that is designed to fit with the learner's day job and which can even be used as performance support tool is generally appealing to line managers.
Focused modules	Line managers are sometimes critical of training that is not designed to focus on the real needs of their teams. By involving them in the process of identifying priorities for training, and in its deployment, advocacy rates will increase
Aligned to tactical objectives	Explain how the e-learning will deliver on tactical objectives for their team, e.g., increasing levels of cross-selling, or reducing error rates. Line managers have performance targets. You can sell the idea of rapid e-learning making it easier to reach these targets
Solves a problem	Show the line manager how the e-learning will solve a problem for them, based on its performance objectives. A time pressured audience who believes that your solution will make their lives slightly easier is likely to support your cause

Kineo insight: Line managers are your new best friends

Line managers play a critical role in getting e-learning used and accepted. If the line managers are not convinced about the value of the program you are going to have a hard time getting it used.

Make time to consider the views of line managers, ensure you address their issues and develop appropriate messages. It can be helpful when implementing e-learning to have a separate module for line managers. This module can make them aware of their responsibilities and provide tools such as PowerPoints to help them in team sessions.

5. Training staff

There could be resistance to the use of e-learning from existing training staff. They may feel that the organisation will need less staff to provide say classroom training which threatens their jobs and status. They may also feel their skills are being devalued or threatened by the introduction of e-learning authoring tools with which they are not familiar. This may be the group most likely to act as cynics or blockers if the e-learning is not carefully positioned. messages can include:

Opportunities for production roles	Running awareness sessions for existing training staff can be helpful. The development of new skills in rapid e-learning also offers broader career opportunitiess. Rapid e-learning can be blended with existing training provision and provide more interesting and varied development opportunities. You may seek to develop trainers' skills in design, authoring, graphics production or in a range of other responsibilities
Opportunities for tutors or mentors	Trainers can use their skills to support learning. This can be an exciting new role for trainers who want to develop in their career in this direction. Many trainers will have some of these skills and be well placed to undertake this role
Reduced vendor reliance	By reducing reliance on external vendors for production, if more is done in-house, rapid e-learning removes many of the uncertainties, frustrations and costs from the e-learning development model

6. IT staff

The delivery of most forms of e-learning involve some discussions with the IT staff. Developing an e-learning programme without IT staff involvement can sometimes mean a great programme fails because there's no means to deploy it.

Early engagement with IT staff is critical to explain the project and to consider with them the delivery options. If your organisation already has a learning management system you should ensure that the authoring tool you propose to use to create the e-learning content does produce content which can be intergrated with the LMS for tracking purposes.

Some specific benefit statements for the IT community:

Low maintenance	Most e-learning authoring tools are simple to use and come with maintenance support which means that the IT staff do not have to learn or support the tool
Low bandwidth use	Issues that can frequently concern IT staff include the use of rich media such as audio and video which can absorb large amounts of bandwidth
Easy integration	Most e-learning authoring tools publish SCORM and AICC compliant modules which are ready to publish directly to the LMS, which should minimise integration and support issues for them.

7. Learners

Ultimately it is the learners' level of engagement, usage and resulting performance from the learning that will deliver success or failure to the project. So, it's wise to consider them key stakeholders from the outset. Consider these among your key messages:

More focused and convenient experience	Less time is wasted in classroom sessions as e-learning is delivered to them, available at time of need
Opportunity for professional development	Learners should be provided with appropriate motivation – contribution to professional development is part of this. Sometimes a simple certificate of completion which they can add to their personal learning record is helpful in this
Tied to key objectives	As with line managers, learners have performance objectives. Showing how your e-learning supports those objectives in an efficient way can be a compelling message.

Kineo insight: The pilot group can be champions

It can be useful to identify some learners at the start of the project who will test the learning and provide feedback. This group can become advocates or champions for the final e-learning programme, cascading early positive messages about their experience.

Ultimately the best way to engage the learners themselves and to ensure that learning is completed is to provide engaging learning and learning is structured so that learners have a degree of control over the learning and the pace for the learning.

8. Trade unions

In some organisations, particularly in the public sector, there may need to be consultation with trade unions or staff associations. The unions may raise issues such as accessibility or equality of access to learning.

It is therefore important to consider your policy on the accessibility of the rapid e-learning. E-learning generally can improve the accessibility of learning giving learners more control over how and where they undertake the learning.

9. Suppliers

There may be a need to get suppliers on board for example, the suppliers of say your learning management system.

If you have a hosted LMS you will need to consider the issues of uploading and testing the e-learning. If the supplier is unfamiliar with your rapid authoring tool you may want to produce some test content at the very start of the project to test in the LMS rather than wait until a full programme is produced. This allows you to resolve any technical difficulties early on.

Step 6: Identify 'Owners' for each stakeholder

Determine who in your team is best positioned to be responsible for engaging and approaching the stakeholder – recognising that it may be all down to one or two people and an efficient approach may be required.

Step 7: Meet and engage stakeholders

Having considered the various stakeholders, their concerns, their current position and appropriate key messages you can then plan how to get your messages across.

Kineo insight: Use a range of methods to engage stakeholders

It can be useful to run a virtual classroom session to engage like-minded groups of stakeholders, or face to face meetings with as many stakeholders available as possible.

Others will require a more personal treatment; consider bringing demos and examples or rapid e-learning to help structure your case.

With senior stakeholders think about the story you want to tell them which will engage them in the objectives of the project. Illustrate a future state that the project will help achieve and what the journey to get there will be.

Show how the project will make a difference to them and their business area. Avoid excessive detail. Try and find out their personal drivers and goals when preparing to meet with them so you can pitch your story appropriately.

Case study: Using rapid e-learning to sell rapid e-learning

At Kineo we worked with a client that was looking to sell the benefits of rapid e-learning to a wide range of stakeholders. We built a rapid e-learning module on the benefits of the rapid e-learning, in the authoring tool.

They were able to demonstrate the approach itself with sample content, explain the benefits of the approach, and show how simple and cost-effective it was to build. Stakeholders could review at their desks, or as part of a virtual classroom session, selling them on the convenience of the approach. This addressed the key messages for a range of stakeholders.

Step 8: Regularly review status of key stakeholders and respond as necessary

It is important to keep the stakeholder matrix under review and monitor the current status of key stakeholders. You may undertake a number of e-learning projects which involve the same stakeholders.

You need to keep stakeholders informed of progress which may take the form of a regular communication. The key is regular communication regardless of how this is undertaken. Often a short note is best, long progress reports mailed to stakeholders are likely to go unread.

Make sure that your successes, particularly achieving the targets set out in your business case, are communicated widely.

Summary

The success or failure of your project will depend upon effective stakeholder engagement. It is important to developer a plan which identifies your key stakeholders, and considers the issues and messages required to get them on board.

As Kotter's theory on managing change indicates you need to build a guiding coalition which has the power to help you deliver the project.

Once you have your stakeholders on board make sure you communicate regularly to keep them informed of progress and success.

Key actions

E-learning Stakeholder **Management:**

- Develop a plan for stakeholder engagement
- Use the stakeholder matrix to:
  - Identify key stakeholders
  - Understand stakeholder concerns
  - Develop key messages for each stakeholder
- Develop a plan of action to communicate and engage the stakeholders.

Take it further

What do you want to do?	Check out these Rapid Guides
Develop a return on investment analysis to use with stakeholders	Rapid E-learning Return on Investment Tool
Determine how to involve subject matter experts in the process	How to Manage Subject Matter Experts
Ensure your messages are delivered at launch	How to Communicate and Launch Rapid E-learning

All these and more are available on **My Kineo**. My Kineo is Kineo's free new support service - an e-learning workbench for corporate e-learning professionals and teams. In it you'll find

- over 30 "how to" guides, examples and templates to help you develop your e-learning skills

- access to live Kineo webinars focused on key challenges in e-learning

- discussion forums where you can ask questions and share with peers and experts, and request peer review and support on a specific project

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