

**52**  
**TIPS**  
ON

# Best Practices for eLearning Development and Implementation



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# 52 Tips on Best Practices for eLearning Development and Implementation

<b>Introduction</b> .....	<b>1</b>
<b>About Our Tipsters</b> .....	<b>2</b>
<b>Twelve Tips on Guidelines and Protocols</b> .....	<b>5</b>
<b>Nineteen Tips on Making Tools Work for You</b> .....	<b>8</b>
<b>Ten Tips on Engaging Your Team</b> .....	<b>12</b>
<b>Eleven Tips on Reaching (and Teaching) Your Audience</b> .....	<b>15</b>

## Introduction

Dear Colleagues,

How can you develop and deploy eLearning quickly, efficiently, and with positive results and buy-in? What does the research say about which eLearning development and implementation methods work best, and which methods are unreliable or ineffective? Our upcoming eLearning Guild Online Forum, “eLearning Development and Implementation: Best Practices” (Sept. 13 & 14) will identify and explore current best practices for eLearning development and implementation, and discuss proven and practical tips, techniques, and tools for creating and delivering high-quality eLearning.

Our presenters for that forum, all experts in the field, have given us a number of thoughtful tips on best practices for development and implementation. In this eBook you'll find 52 tips from 12 experts, including tips on establishing a common toolset and methodology; the risk when using proprietary tools; dealing with SMEs; and why using fewer authoring tools is better for localization projects.

We edited the tips and organized them into four categories: Guidelines and Protocols, Making Tools Work for You, Engaging Your Team, and Reaching (and Teaching) Your Audience.

I hope you find a great deal of valuable information in this eBook, and are able to use many of the tips to simplify and improve future projects. I also hope you consider attending or presenting at an upcoming eLearning Guild Online Forum!

Sincerely,

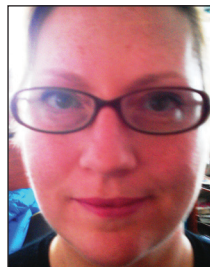
Chris Benz  
Director of Online Events, *The eLearning Guild*

## About Our Tipsters



**Shari Brennan**, *Learning and Development Consultant, V.P., Wells Fargo*

Shari Brennan is a learning and development professional who has been delivering results for more than 20 years. Shari focuses on her clients' overall strategic goals and translates them into innovative solutions. Shari leads the eLearning Connections Committee at Wells Fargo that sets standards, policies, and best practices for eLearning.



**Christine Collet**, *Learning Consultant, Intrepid Learning Solutions*

Christine Collet is a senior learning consultant based in Seattle, WA. As a learning and development professional, Christine is passionate about implementing strategic learning programs aligned with measurable business goals for global organizations. She has developed and taught content for a range of audiences, including software sales and technical professionals, real estate professionals, and college and K-12 students. Christine holds an M.Ed. degree in educational communication and technology from the University of Washington.



**Stephanie Demiris**, *Global Learning & Engagement Manager, Deckers Outdoor Corporation*

Stephanie Demiris's academic background is in cultural anthropology, and she holds an M.A. degree in that field. Stephanie considers herself an innovative learning and development professional with extensive background in the leadership, management, and implementation of organization-wide learning development strategies for both U.S. and international markets.



**Todd Dooley**, *eLearning Designer, WellPoint*

The greater part of Todd Dooley's career has been spent in WellPoint's training department, where he was responsible for claims and customer service training, instructional design for operations, and eLearning design for the enterprise. He is a Certified Technical Trainer (CTT+), a Certified Instructional Technologist (CIT), and an International Society for Performance Improvement (ISPI) Award of Excellence winner for Outstanding Performance Aid.



**Jan Gray**, *Instructional Design Manager, Blood Systems*

Jan Gray has more than 25 years' experience in education and training, and holds a master's degree in educational technology from Arizona State University. Jan's hands-on experience with authoring tools includes the Articulate suite, Adobe Flash and Captivate, Camtasia, and Raptivity. In her current position, she leads the transition from an environment of primarily instructor-led training to one that includes a significant amount of eLearning, especially for software, soft-skills training, and regulatory topics such as basic safety and current good manufacturing practices (cGMP).



**Mark Lassoff**, *Founder and President, LearnToProgram.tv*

Some think Mark Lassoff was born to program. Writing his first programs on a Commodore 64 at age 11, Mark has been coding for over 25 years. His expertise is in Web development languages and mobile development, and he is currently an in-demand trainer with his own company. Mark has taught at companies including Discover Card Services, Lockheed, and Booz Allen Hamilton, and he consults with Dell, Target, the Federal Aviation Administration (FAA), and the U.S. House of Representatives. Mark also writes the "Development Tips" column for *Learning Solutions Magazine*. He lives in Connecticut and is a proud cancer survivor.



**Camilo Muñoz**, *Founder and CEO, Translation Source*

Prior to founding Translation Source, Camilo Muñoz worked at Lehman Brothers' media and telecommunication investment banking group in New York City. Camilo also co-founded Abiertamente, a developer of eLearning content in Latin America. He holds an M.B.A. from the Wharton School, an M.A. in international studies from the University of Pennsylvania, and a B.S. in industrial engineering from the University of Florida. Camilo is a board member of the Association of Language Companies and speaks English, Spanish, and Portuguese.



**Ron Price**, *Senior Vice President, Yukon Learning*

Ron Price has over 30 years of combined experience in organizational development, instructional design, business coaching, leadership development, and experiential learning. Ron's unique background has allowed him to work with a broad array of customers, ranging from schools such as Duke University's Fuqua School of Business to multinational companies such as BP, ConocoPhillips, and PepsiCo. He facilitates training on rapid eLearning and develops eLearning solutions using the Articulate suite of products. Ron is passionate about all things learning and is a frequently requested speaker at learning industry events.



**Michelle Simek**, *Manager of Instructional Design and Development, WellPoint*

Michelle Simek has 13 years' experience in the training industry at Empire BlueCross BlueShield and at WellPoint. She spent the first six years of her career focused on instructional design and training for instructor-led training programs, and has dedicated the last seven years to eLearning design and development. She is currently responsible for a team of 12 eLearning designers and a graphic artist.

**Kevin Thorn**, *Chief NuggetHead and Owner, NuggetHead Studios*

Kevin Thorn is an award-winning eLearning designer with over 30 years' experience in the training industry, with the last decade in eLearning. After retiring from the Army as a trainer, Kevin earned a technology management degree in pursuit of an IT career. When his interest in technology meshed with his passion for training, he found a new career in eLearning. Kevin's experience in instructional design, storyboarding, eLearning development, LMS implementation, illustration, graphic design, storytelling, cartooning, and comics provides him the awareness and knowledge to successfully work any eLearning project from "cradle to grave."

**Eileen Van Tyne**, *Learning Consultant, Intrepid Learning Solutions*

Eileen Van Tyne is a senior learning consultant based in Oakland, CA. Eileen has over 11 years' experience performing analysis, design, and development to help clients achieve business goals through learning solutions. She holds a bachelor's degree in English from the University of Washington.

**Anya Wood**, *Senior Manager, Business School, KPMG*

Anya Wood is a senior manager at the KPMG Business School in Canada. Her professional areas of expertise include rapid design and development, the use of emerging technologies for learning, and building collaborative partnerships. She is the author of several learning-technology publications and presents regularly at industry conferences. Anya holds a master of distance education degree from Athabasca University.



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#### **OPENING SESSION**

**101 - eLearning Development Is Like Changing the Tires on a Moving Truck**, Kevin Thorn, *NuggetHead Studioz*

#### **TOOLS AND TECHNIQUES**

**201 - Leveraging the Power of the Crowd in Yammer to Build a Culture of Learning**, Stephanie Demiris, *Deckers Outdoor Corporation*

**301 - Beyond Software Simulation: Using Captivate to Create Immersive Learning Experiences**, Jan Gray, *Blood Systems*

#### **TECHNIQUES AND APPROACHES**

**202 - Using Standardization to Align eLearning Development**, Michelle Simek & Todd Dooley, *WellPoint*

**302 - eLearning Localization: Attaining Behavioral Change and Local Objectives**, Camilo Muñoz, *Translation Source*

### **FRIDAY, SEPTEMBER 24**

#### **TOOLS AND TECHNOLOGIES**

**401 - Developing Curriculum Solutions Using SharePoint**, Shari Brennan, *Wells Fargo*

**501 - Once upon a Time ... Getting Started with Articulate Storyline**, Ron Price, *Yukon Learning*

#### **TECHNIQUES AND APPROACHES**

**402 - Crowdsourcing Micro-expertise with Video Vignettes**, Christine Collet & Eileen Van Tyne, *Intrepid Learning Solutions*

**502 - Small Shop, Big Results: How to Achieve a Powerful Impact with a Small Team**, Anya Wood, *KPMG*

#### **CLOSING SESSION**

**601 - Looking Beyond Today's eLearning Tools**, Mark Lassoff, *LearnToProgram.tv*



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## Twelve Tips on Guidelines and Protocols

When developing and implementing eLearning, the unexpected always happens. Having a system in place will help resolve issues and move the process forward with a minimum of delays and disagreements.

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Establish a steering committee. A steering committee can take away the pressure of being solely accountable for decisions and the direction of learning. A steering committee can help:

- Make decisions
- Establish priorities
- Legitimize the team and your endeavors
- Create policy
- Spread the word about what you are doing
- Reduce pressure on you

*Anya Wood*

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When kicking off a big project, you typically have a project leader, a couple (or more) SMEs, and an extra stakeholder or two on the core team. Be sure everyone is in agreement with the project timeline and milestones. Most importantly, ensure there are “content freeze” points along the timeline. You don’t want last-minute changes and edits to already-approved changes because a wandering stakeholder peeks at your course.

*Kevin Thorn*

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Establish a common toolset and methodology to create standardization across all developers.

*Todd Dooley and Michelle Simek*

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Establish an intake process to manage volume. An intake process allows you to manage course requests and course volume. It also provides you with an opportunity to say no, or to defer a course for development until a later date.

*Anya Wood*

Whatever the future holds for tracking eLearning, organizations use a variety of LMS platforms. Implementing an LMS can be exhausting, and it typically takes a couple of months to properly integrate it with your organization's other systems. If your project entails both an LMS implementation and an eLearning library of courses, be sure to keep them as two completely separate projects with their own milestones. Also, if you plan for a month of testing, add another month – you'll need it for not knowing what you don't know!

*Kevin Thorn*

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To proactively manage SME issues, identify the common challenges you encounter while working with SMEs. Discuss these with your SMEs at the beginning of your project so they are clear on what challenges they (or you) may encounter. It may not prevent issues from arising, but it can make the issues easier to talk about when they do surface.

*Anya Wood*

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When storyboarding your eLearning projects, write as if it's the only document a developer can use to bring your instruction to life. Include as much detail about navigation, interaction feedback, narration, additional programming notes, visual and graphic treatments, etc. The more time you devote to detailed design documents, the faster the development process itself will go.

*Kevin Thorn*

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Keep your protocols as black and white as possible. If something can be misinterpreted, it will be.

*Todd Dooley and Michelle Simek*

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To encourage rapid development, limit the guesswork for the majority of your courses. For example, choose from a set of standard templates and standard interactions. This doesn't mean all your courses will look or function the same; it just means you streamline what you can and save the special effects for when it really matters.

*Anya Wood*

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Realize that your protocols need to be flexible and open to change. Knowing this up front relieves a lot of pressure. Be open to trying new things; if they don't work out, make revisions.

*Todd Dooley and Michelle Simek*

Cost-effective eLearning localization requires planning from the start. Global localization projects are full of efficiencies you can achieve if you plan correctly. Visualizing the entire process will help you find such efficiencies and use them to your advantage.

*Camilo Muñoz*

Decide your stance on reviewing storyboards with your clients, especially when you are developing a course for an internal group. With some tools, it's quicker to mock up a course and show it to the client for review than it is to create a storyboard, explain it to them, and then develop it. You should always have a plan, though, and should never start development without one!

*Anya Wood*



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## Nineteen Tips on Making Tools Work for You

You got them for a reason, and you want to make full use of their features. But tools have limitations, and keeping those limitations in mind now can save you a lot of trouble later.

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If your Adobe Captivate file becomes very large, try breaking it into multiple files and then daisy-chain those files. This will work well for programs that are linear in design.

*Jan Gray*

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Microsoft SharePoint is a collaboration tool that allows you to easily share documents, calendars, tasks, etc., with others in your company or organization. Within this tool, you can create a curriculum with the Wiki Site option. The Wiki site will look and feel just like a Website to the end user or participant; however, you do not need programming resources to develop the pages, and you can quickly develop and maintain the content.

*Shari Brennan*

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Think carefully before using proprietary tools. The makers of these tools may hold your content captive and prevent you from sharing it in avenues you need. No one anticipated the iPad when creating Flash-based learning five years ago; if they had, they might not have selected a proprietary product.

*Mark Lassoff*

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Use placeholder rectangles, squares, etc., for images on your slides. This will give you the dimensions needed for resizing your graphics. Keeping the graphics in your library to the exact file sizes you need (or close) will keep your overall file size as small as possible. Resizing is especially important for graphics larger than 1MB.

*Jan Gray*

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In Captivate quiz questions, where you ask learners to sequence steps in order, limit the individual steps to one line of text each. This will avoid possible problems when the learner moves the items around.

*Jan Gray*

When you add a hyperlink to a SharePoint Wiki page, that link will open in the existing window. To have the link open in a separate window, add target="\_blank" using "Edit HTML Source" in the SharePoint Wiki editor. Following is an example of how to place the code:

```
<a href="http://google.com" target="_blank">
```

*Shari Brennan*

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When using images with transparent backgrounds, you may see a white "halo" around the image during playback. A good way to remove this is to edit the image in Photoshop using the Magic Extractor. Zoom in on the image as much as possible, and then remove any "edge" pixels where the coloring is faint.

*Jan Gray*

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SharePoint sites allow you to set up permissions that allow anyone within your organization to access the content, or you can limit access to specific groups and individuals. You can manage the access rights to the entire Wiki site or break it down into separate access rights for individual site components. For example, the Wiki content can have access rights that are separate from a document library holding reference materials.

*Shari Brennan*

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Every story in Articulate Storyline is built with the same basic building blocks – States, Layers, and Triggers. Getting a handle on these will help you build just about anything you need in Storyline.

*Ron Price*

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If click boxes overlap on a screen, you may see blue or green "smudges" in the playback. Make the click boxes smaller or separate them if possible.

*Jan Gray*

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eLearning development trends seem to move faster than a rapid-development eLearning course. Keeping pace can be daunting. Many, if not all, of the most commonly used authoring tools (rapid or otherwise) offer 30-day free trials. When deciding which tool best fits your organization or team, take the time to practice using them, and learn how each tool might fit in your overall workflow for collaborative projects.

*Kevin Thorn*



Since one accesses SharePoint curriculum similarly to a Website, participants can bookmark pages they want to revisit or use as a resource. Therefore, they do not need to retake the curriculum to access important information. In addition, you can build separate pages to specifically become resource or quick-reference guides.

*Shari Brennan*

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One of the greatest benefits of Articulate Storyline also represents one of its greatest challenges – the flexibility of this tool will allow for a variety of solutions to any problem. A necessary skill is to not just know how to do something in Storyline, but to be able to determine which of the ways of doing something will best serve your needs.

*Ron Price*

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One-click publishing to multiple delivery platforms (desktop, mobile, tablet, etc.) is becoming more common with authoring tools. Remember why your courses are publishing to multiple platforms, and don't do it just because you can. Designing for desktop is not the same as designing for mobile, and that's before any technical limitations or restrictions.

*Kevin Thorn*

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To create a new SharePoint curriculum using SharePoint 2010 within an existing site collection, take the following steps:

1. Choose *Site Actions*
2. Select *Create*
3. Under the *Web Pages* column, select *Sites and Workspaces*
4. Choose *Wiki Site* and fill in the appropriate information for the site setup such as site title and description
5. Once the Wiki site is created, you create individual pages (similar to a Website) using the built-in WYSIWYG editor

*Shari Brennan*

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In Articulate Storyline, using Story View is a great way to see how the scenes and slides of your story will interact with each other and to adjust the custom player options and slide triggers.

*Ron Price*

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Click and Drag is not the same as Tap and Swipe.

*Kevin Thorn*

When editing a Wiki page in SharePoint: If you are having trouble with formatting not holding, such as spacing issues, font colors not sticking, and bullets not aligning, use the following tips:

1. Use tables to hold formatting in place. This works very well for locking down images and keeping text within specific margins.
2. Copy the content and place it into Microsoft Word. Make your changes and edits there, and then copy and paste it back into the Wiki page editor. MS Word is a great place to make formatting changes that are giving you trouble in the SharePoint Wiki editor.

*Shari Brennan*

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There are some key features in Articulate Storyline that are not accessible by a menu choice or ribbon, but instead by a right mouse click. Some of those key features include:

- Button sets
- Exporting a video from a screen recording
- Action fine-tuning a screen recording
- Aligning objects to cue points and playhead in the timeline
- Saving an object as a picture

*Ron Price*

## Ten Tips on Engaging Your Team

If the team creating your project isn't excited, your learners won't be, either. A team that's focused and engaged – including you – will deliver the strongest content for your audience.

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Think about meaningful ways to engage your leadership team; they will be critical to driving engagement across the enterprise. Our company started a core-value initiative that gave us the opportunity to start a global conversation in Yammer about what the core values mean to each employee. We had each executive leader sponsor one of our core values and lead a discussion around it. It was such an easy way to engage them, and it simultaneously allowed us to drive executive adoption. Sometimes the smallest, easiest things take off, so don't overthink it.

*Stephanie Demiris*

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Explain “hard and fast” rules. When your associates understand the reasoning behind a rule, it helps lessen their resistance to it because they don't perceive this as merely “opinion.”

*Todd Dooley and Michelle Simek*

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With compliance-related material, SMEs may believe that the content is “too important” to be delivered via eLearning. Be prepared with evidence that eLearning can be as effective, or more effective, than instructor-led training, and get their buy-in early in the development process.

*Jan Gray*

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If you can't program, learn. If you can't (or won't) learn, add a programmer to your team. The ability to go beyond the “slide and speak” model of eLearning will add much to the quality of your eLearning output and to the engagement and overall experience of your learners.

*Mark Lassoff*

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Don't just teach your employees how to use your company's social networking platform; teach them how to be content creators.

*Stephanie Demiris*

Involve your designers in the process. Their buy-in is critical to the success of the team; nothing builds in ownership more than being involved in the process.

*Todd Dooley and Michelle Simek*

Be a business partner, not a learning professional. If you can understand where the pain points are in the business, you will be able to leverage your company's social networking platform as a way to work smarter, not harder.

*Stephanie Demiris*



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Recognize the strengths of the individuals on the team. Use these strengths as an advantage for coming up with guidelines everyone can live with and abide by.

*Todd Dooley and Michelle Simek*

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Subject matter experts can make your life easy or exceptionally challenging. To help you manage this relationship, do everything you can to ensure SMEs understand the process and what's expected of them. In your initial meeting with them, consider providing SMEs with a short pre-read document, or review key information about their role. Be clear, concise, and most importantly, brief!

*Anya Wood*

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Early on, identify a group of ambassadors in the organization who can promote your social initiative – employees you know will use your company's social networking platform regularly and promote it. This will help you drive engagement and content across your enterprise.

*Stephanie Demiris*



## Eleven Tips on Reaching (and Teaching) Your Audience

On what device does your audience do its learning? Laptops? Tablets? Smartphones? Do you address each platform? Do your deliverables need to be translated into other languages? And once you've hit all of your targets, how will the content impact your learners?

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Spend time understanding how your in-country teams actually learn and foster behavioral change. Before investing in international eLearning development and implementation, make sure your program fits culturally. Simulations, role-playing, and coaching are not universally well received by all cultures.

*Camilo Muñoz*

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Learn HTML. Learn it backwards, forwards, and sideways. HTML is, and will continue to be, a universal way of marking up content so you can output that content on the increasing diversity of traditional and mobile device platforms.

*Mark Lassoff*

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How to create a video challenge that elicits microexpertise:

- Offer prizes to encourage your target audience to submit entries.
- Release the videos as you receive them.
- Communicate often with the entire community.
- Provide support for newbie video users – communicate how and what type of support you can provide.
- Decide on the technical specs: What platform will you use? Will you post to the platform for participants or will participants post directly? Is a specific format required? Are there size limitations?

*Christine Collet and Eileen Van Tyne*

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When you need to localize your eLearning content, front-load your deliverables and testing in the original language. It is much cheaper to fix something once, before translating and localizing it into 20 languages.

*Camilo Muñoz*

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When working with compliance-related material, you may run into challenges regarding learner navigation control. The SME may want some way to ensure that learners have

viewed and/or heard everything in the program. You may need to find some level of compromise to meet the SME's request and still provide as much learner control of the navigation as possible. Check out widgets and Advanced Actions for possible ways to ensure items have been viewed or can be reviewed.

*Jan Gray*

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Be willing to experiment; it's the only way to figure out what will and won't work. Find some employees, groups, departments, etc., with which you can experiment. When you're successful, leverage the heck out of it and others will start to see value.

*Stephanie Demiris*

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For localization projects, the fewer authoring tools you use, the better. Imagine a localization project that uses seven different authoring tools and that needs to be localized into 20 global markets. Such an imaginary project would likely require the training and support of 140 proficient users. In addition, the chance that one or more of these authoring tools does not offer proper localization support is higher – for example, for right-to-left languages or character-based languages – and will increase your development risks.

*Camilo Muñoz*

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Think of platform and content separately. Your content is what you want your participants to learn. Your platform needs a distinct way of displaying that content, whether on an iPhone or a laptop with a 17-inch screen. Separation of platform and content also encourages reuse and ease of updating.

*Mark Lassoff*

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International audiences are always a moving target – eLearning implementations that require translation and localization will have at least as many target audiences as target languages. As a result, your original content must be very flexible and adaptable for maximum impact. Localization projects are a great opportunity for instructional designers to shine!

*Camilo Muñoz*

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Content rules. Content rules. Content rules. Oh, and finally, content rules!

*Stephanie Demiris*

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A picture is worth 1,000 words ... and it usually doesn't require localization into any language.

*Camilo Muñoz*