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A Team Toolkit for Successful Change in Digital Learning

Who is this for?

This toolkit is intended to be used by organizations implementing a change related to digital learning. The process laid out in this toolkit is meant to support the facilitation of an effective transition.



Readiness Checklist

- ☐ Does the implementation of this change align with the organization's overall vision, mission, values, and goals?
- ☐ To support this change, are leaders communicating the goals of this implementation clearly? Is the messaging consistent?
- ☐ Are there support mechanisms in place for internal and external stakeholders? (learners, end-users, employees)
- ☐ Is information being shared across the organization through a variety of media? (online, print)
- ☐ Are end-users being consulted with regards to this new change? Have relevant past experiences been considered?
- ☐ Has a change management strategy been considered to provide direction and informed decision making throughout the change process?
- ☐ Are sufficient resources available to implement this change? Will more resources be required in terms of staffing to make the necessary changes?
- ☐ Will the digital learning implementation be flexible enough to support organizational growth? Has demand and supply been considered?
- ☐ Have the benefits of this project been communicated to all parties who will be involved in the implementation and support of this change? Are they motivated?
- ☐ Have the potential problems, risks, and consequences from implementing this change been considered? Are there enough practical solutions available to justify moving ahead with the project?

Planning

DATA COLLECTION *Determine what is happening or has already happened with regards to organizations implementing change in digital learning environments. Analyze the current situation of the organization and the direction for future technology enhancements.*

✓	Process	Task Owner	Due Date
☐	Evaluate similar organizations within the industry and determine what digital learning tools have been successful or are common for similar outcomes		
☐	Determine what features are available on the market and how they can benefit the needs of the organization		
☐	Research digital learning platforms or tools that encompass the features required to support the change		
☐	Analyze current situation of organization & direction for future tech enhancements (eg. current knowledge of tech applications & sustainable support for change)		
☐	Identify learning traits of internal customer (traits common with specific demographics i.e. millennials/baby boomers)		
☐	Uncover the needs of the end user to interact effectively with digital learning tools		
☐	Examine current processes and how they will change once the implementation is complete.		

IDENTIFY STRENGTHS *Collect valuable insight on internal resources to leverage to move the implementation forward.*

✓	Process	Task Owner	Due Date
☐	Delegate one leadership representative in each core department affected by the implementation and have them provide a list of skills and resources within their department that can either support or enhance the project.		
☐	Create a list of all internal assets that can be leveraged throughout the process and their respective owners		

CONSTRAINTS *Using information gathered from the external and internal data collection, identify the barriers and organizational weakness that can be identified as opportunities to improve and put a plan in action. Consult with key stakeholders to allocate resources and create time and cost parameters for the project.*

✓	Process	Task Owner	Due Date
☐	TIME: <ul style="list-style-type: none"> Schedule out how long each component of the project implementation will take. Indicate when each phase should be complete to allow the project to stay on schedule. 		
☐	RESOURCES: <ul style="list-style-type: none"> Evaluate employee availability and identify who will be working on the implementation full time and who will be working on other projects simultaneously to help divide workload adequately. List and determine whether there are economic, policy, or technological constraints, then address as needed. 		
☐	COST: <ul style="list-style-type: none"> Account for 100% of the costs required (detailed estimate). Develop budget and budget reporting process to ensure accountability and to manage cash flow. 		

EVALUATE RISK *Examine potential risks and identify ways to neutralize them.*

✓	Process	Task Owner	Due Date
☐	Identify potential problems or issues that may arise: <ul style="list-style-type: none"> Determine how likely they are to occur. What can you do ahead of time to avoid potential issues? How can you neutralize the issues if they are unavoidable and come up? 		
☐	Insurance: <ul style="list-style-type: none"> Determine if insurance or third party protection is required to transfer risk. 		
☐	Evaluate the consequences of accepting the risks involved: <ul style="list-style-type: none"> Are there any risks associated with contracts involved in implementation? 		

DEFINE ACTIVITIES *Based on the data and information formulated to this point, outline the proper tasks required to move forward effectively.*

✓	Process	Task Owner	Due Date
☐	Identify all legacy assets that will need to transition		
☐	Outline all sub-projects that need to be completed to support execution		
☐	Define all key roles and responsibilities		
☐	Analyze current situation of organization & direction for future tech enhancements (e.g. current knowledge of tech applications & sustainable support for change)		
☐	Define clear target due dates with clear outlined priorities		
☐	Define key performance indicators and success determinants		
☐	Determine a regular communication/meeting schedule		
☐	Create a timeline chart to visualize the implementation schedule		

PLANNING KEY STAKEHOLDER COMMUNICATIONS

1. Who is responsible for maintaining communications?
2. By what means will communication take place (i.e. in-person meetings, email, and/or through an online space such as Bandcamp or Samepage)?
3. At what intervals will key stakeholders communicate?

SAMPLE CHART FOR PROJECT SCHEDULE

	IMPLEMENTATION TIMELINE (schedule dates here)
Consult & Communicate with Stakeholders	
Change Management & Preparation (Phase 1)	
Full Implementation (Phase 2)	
Completion & Integration (Phase 3)	

Implementation

MONITORING AND COMMUNICATIONS *Regular, effective communication with stakeholders is essential for successful implementation of projects.*

Tips on effective communication for supporting the project:

1. Monitor status of project throughout entire implementation process
2. Coordinate regular communications with stakeholders to report & discuss:
 - progress, challenges, and milestones
 - news and feedback from the front lines
 - alignment with schedule
 - current expenditures in relation to overall budget
 - quality analysis
3. Prepare and update stakeholders before each new phase of work
4. Be diligent in watching for risks and dealing with challenges, then communicate, document, and implement appropriate project revisions as needed

PROJECT IMPLEMENTATION PHASES

Phase 1: Change Management and Preparation

Phase 2: Full Implementation

Phase 3: Completion and Integration

✓ PHASE 1: CHANGE MANAGEMENT & PREPARATION	Task Owner	Target Start Date	Target End Date
☐ Continuously communicate and consult with stakeholders at all levels to create and maintain interest, awareness, and buy-in		ongoing	ongoing
☐ Design & create prototype			
☐ Pilot the prototype within a controlled setting			
☐ Capture feedback			
☐ Design, build, & test improvements; make adjustments as needed			
☐ Deliver training			
☐ Provide support			

✓ PHASE 2: FULL IMPLEMENTATION	Task Owner	Target Start Date	Target End Date
☐ Launch full program (execute activities from planning phase applicable to the specific project until all objectives are accomplished) <ul style="list-style-type: none"> • Be flexible, aware, and prepared to address problems and mitigate risks • Continue to provide training and support as needed • Make refinements whenever possible: navigate challenges, communicate success & achievements • Risk management: diagnose, recover, and regenerate as needed (review and mitigate risks daily) 			

✓ PHASE 3: PROJECT COMPLETION & INTEGRATION	Task Owner	Target End Date
☐ Determine project targets as complete (after accomplishing all Phase 2 tasks)		
☐ Evaluation, assessments, review, and feedback (see next section)		
☐ Recommend best practices and establish policies to consolidate project within the organizational context for successful, sustainable use in the future		

Evaluation

EVALUATION *The effectiveness of the project can only be assessed if a systematic evaluation is conducted. The following could be used as a question template for small projects, or as guidance for a larger evaluation process.*

Adherence

Was the digital learning implementation aligned with the mandate or expectations?

Reaction

Did the users like the digital learning implementation?

Do the users believe that the implementation helped them acquire the relevant knowledge, skill, or attitude?

Learning

If a quantitative assessment is conducted, did the learners perform to standard?

Behaviour

How does an immediate supervisor, or peer review, rate the performance of the individual after completing the interaction with the digital learning implementation?

Results

At the executive level, is there perceived value in the investment in the digital learning implementation?

Process Improvement

Is the digital learning implementation contributing to the organization's vision, mission, values, and goals?

If no, have the organization's objectives changed, or how can the implementation be improved?

Additional Resources and References

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