A digital transformation roadmap

For e-learning plans

Why is a roadmap necessary to lead a digital transformation in education?

The education sector, like most industries, has become increasingly customer-centric. Driving this trend is a need for 'End-user Experience' driven by 'Digital Capabilities' and:

→ **Workforce engagement takes precedence with the need for remote work access and continuous access to technology.**

→ **Data compliance and protecting information from cyberattacks and breaches**

→ **Increasing dependencies on external agencies, distributors and suppliers raising the need for a unified network**

In this roadmap you will learn how plan and execute a successful digital transformation project for e-Learning plans in a formal education space.

Some of the top questions of the digital business transformation initiative are:

1 Is your digital ambition to optimize or transform ?

2 What are the key stages and activities ?

3 Which leaders and teams need to be involved ?

Disclaimer:
This roadmap gives an indication for planning eLearning in a formal education space; by no means this article is exhaustive. Depending on your institute, the size of the project, your current portfolio and infrastructure have an impact on the comprehensiveness of the project planning. The elements listed here are seen from a macro-view.
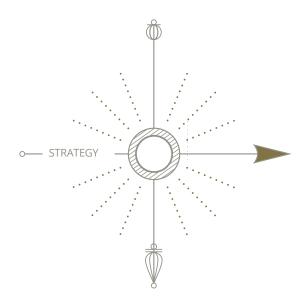
What are the key stages

This best-practice insight is distilled from years of experience developing the digital transformation strategy of EHL alongside other key stakeholders and management staff, as well as interactions with clients who with the help of EHL Advisory Services have successfully implemented digital transformation initiatives.

The roadmap includes key tasks and considerations for education leaders to consider at each stage but is not an inclusive list and additional elements may be required.

AMBITION > DESIGN > DECISION > IMPLEMENTATION > LAUNCH > REDEFINE

Ambition

Strategy defined, interest and excitement generated

In the pre-planning stage, start by formulating ambitions and aligning the company's desires with market information and long-term goals. This is the moment to conceptualise what you really want to achieve as a company.

During the ambition stage, analyze the market, formulate the needs and desires and make sure to create an integrated direction, an understanding of the prospective impact, and size of the potential project. It is recommended to address some significant questions in this stage and see if answers meet a clear rationale. Main questions to be addressed in this stage are: What do we want and why do we want this? Most often ambition is born out of desire, not out of need, therefore within the ambition stage it is essential to align the what and why.

Essential tasks at the ambition stage:

① Analyze the market situation

Create a company-specific situational analysis based on :

→ External market drivers for change

→ Internal drivers for change

→ Market potential for growth

→ Challenges and potential pitfalls

→ Time frame desired implementation and long term need

② Avoid mix of terminology and jargon

Before moving a step further, create a united terminology so that whenever the ambition is shared or leaked, everyone can understand it and there is no room for individual interpretation of concepts.

For digital learning specific terms,, we tend to mix up online learning, blended learning, digital learning, flipped learning, e-Learning, technology steered learning, computer-based learning, etc. Each might have a different interpretation and a different impact on your plans.

Anouk Tenten

A digital transformation roadmap 5

3 Clarify the rationale

Next, link the company's ambition with the outcomes of your situational analysis and then formulate a clear rationale of why as a company you aim to follow this concept. The overall ambition should resonate at all levels within the institute: organization, academic, staff and student. Even if at board level the ambition is a need to cut costs, reduce resources or increase revenue, it is essential that the shared ambition resonates with a clear "why" for every stakeholder.

Our aim is to develop blended learning programs, whereby working professionals from all over the world have the ability to enhance their knowledge and skills based on directly applicable industry requirements. Blended learning for us means: programs that can be followed through a mix of remote, asynchronous and campus presence. By creating this flexible study option, we align the aim to increase resource efficiency and reduce impact on infrastructure.

Anouk Tenten

It is important that the concept, the drive behind the journey of change, is shared and understood within the organization. A new direction or project may incorporate a lot of change management; and already in the ambition stage there is one more task to be done.

A digital transformation roadmap 6

④ Communicate values and principles

Change management requires that people who are affected or involved feel part of the journey from an early stage. Therefore, if at all possible, it is recommended to develop and communicate values and principles for all resources. It is important that fears, (mis)beliefs and perceptions become transparent for those whose responsibility might be affected the most. The impact and consequences of potential plans should be acknowledged.

As a company aims to take new directions, the decisions, timelines, resources and budgets could be impacted. Whatever is decided and done adequately early on during the ambition stage will have an impact on the success of your change management – and further steps along the digital roadmap.

With our new direction, we aim to increase flexibility for our resources. We ask each individual to evaluate if the new direction aligns with personal ambition that requires determination, patience and time. For those taking the new directions with us, it will enhance responsibilities and possibilities of growth with our institute.

Anouk Tenten

A digital transformation roadmap 7

Design

Options and ecosystem assessed for plan development

The design stage requires diving into a variety of options and pre-analyzing the potential impact of all stages of your developments. It is key that your desired transformation meets (market) demand by the time of delivery and beyond. Change, development and go-to- market might take a long(er) time, and it is important in the design stage to make decisions based on resource availability, ownership, and potential outsourcing partners, in order to avoid delays, miscalculations or false planning.

Essential tasks at the design stage:

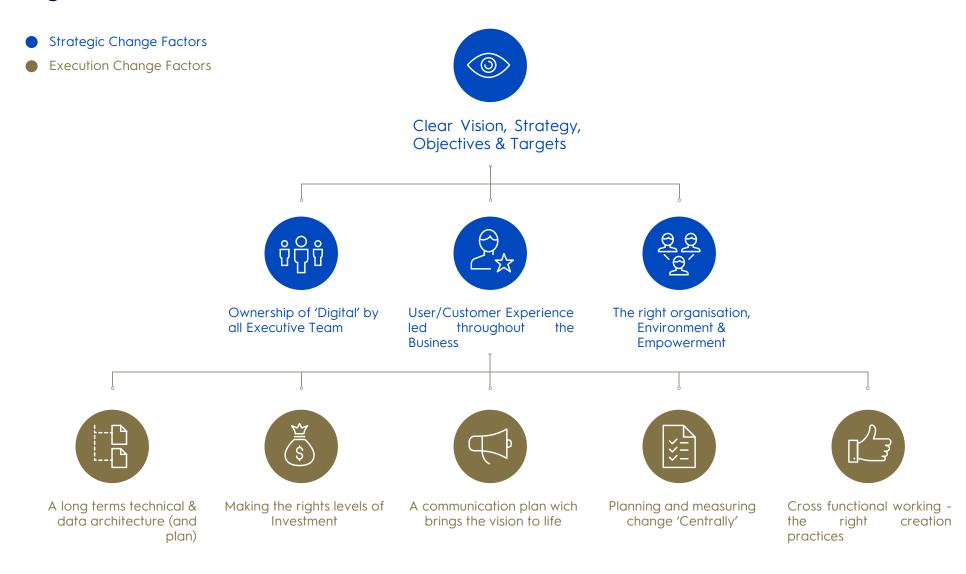**①Start with program development & academic requirements**

- If your programs need to follow certification, accreditation or other regulations that will impact the design and development of your program/s, then make sure these rules are clear before designing any online/e-Learning concept, (regulations can be related to contact hours, amount of study workload, physical presence, etc.).

- Depending on the scale of your digital learning plan, it is recommended to define how you will measure Quality & Control for your (new) online programs. This will have an impact on the design and further developments, (delivery method, LMS user rights, GDPR, standardization of formats, credit assigning, etc.).

A digital transformation roadmap 9

② Analyze and set up the infrastructure & resources

- Set up a Governance team; each member should have a clear understanding of the responsibilities and align with their teams on project timelines, progression, disruptions, budgets, communication, planning etc. There should be one person made responsible for the overall project management.
- Map the human resources of your organization: numbers, age, skills, expertise, working hours, etc.
- Indicate specifically which people will be affected by the project. This overview should give you an understanding if extra resources, outsourcing, training & development are needed.
- Define a group of key people in the academic program development, student operations and IT who are assigned certain responsibilities for the development, implementation and launch tasks within their department.
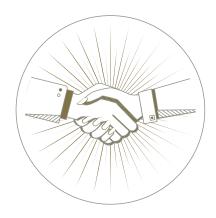
- Make an estimate of the Financial Planning (product life cycle planning), costs and projections. Identify, create and build new business and revenue models that would provide your enterprise with a strategic advantage. Analyze if financial resources are present or need to be generated and whether this requires a different cost calculation alternative.
- Investigate (limitations of) the infrastructure: meaning IT & physical campus infrastructure. Evaluate the technology disruptions and innovations in the (education) industry and make sure you know what competitors are doing or what other institutes are developing. There may be potential to seek out strategic partnerships that align with your transformation, instead of losing too much time on developments that are not your company's expertise. Topics as LMS integration, student IT (hard /software)support, course design & development and IP ownership, user licenses and data sharing, data storage, CRM & CSM integration, campus support facilities, test labs, experiment rooms, etc. need to be considered.

A digital transformation roadmap10

Digital Transformation Committee

🔵 Strategic Change Factors
🟤 Execution Change Factors

Clear Vision, Strategy, Objectives & Targets

Ownership of 'Digital' by all Executive Team

User/Customer Experience led throughout the Business

The right organisation, Environment & Empowerment

A long terms technical & data architecture (and plan)

Making the rights levels of Investment

A communication plan wich brings the vision to life

Planning and measuring change 'Centrally'

Cross functional working - the right creation practices

A digital transformation roadmapǁ

3 Establish a business & project plan

- This should be the task of a project manager with the input of key stakeholder, A project manager should have already created in the design stage a Planning & Milestones overview upfront. The digital transition and development can take a long time, and sometimes it feels like there's no light at the end of that long tunnel. Set milestones and make sure these are shared on all levels, this way everyone can follow the track and remains motivated. Taking into account that releases of new educational products can take up to 5 years, make sure the decisions, resources, planning is realistic and meets your financial planning and goals.

- Goals, milestones, KPI's: Success of a program can only be measure if costs of development, cost of lead, and enrollment are measured - though an online program only measures success upon graduation date of your student cohort. Depending on the entry level and enrollment procedures of your programs, it is common for more "remote/self-study" programs to have higher dropout rates, and this could have an impact to your financial projections.

Decision

Remove any ambiguity and ensure key design choices have been confirmed

In the decision stage, all possibilities of the design stage need to take shape and there should be no room left for ambiguity. There are often changes and disruptions in a change process, and it's very common that the road of a digital journey (re) shapes along the way. However, at this stage, it time to activate decisions.

Essential tasks at the decision stage:

①Establish financial plans and goals

The costs for the entire program and development need to be calculated. Define budget allocations, costs calculations, budget ownership as this will determine how you will handle any of the following steps in your roadmap. Without investment and projections, a digital journey will stagnate and you will throw away money without reaching any desired outcome. Each stage of the life cycle needs to be calculated: i.e. LMS

licence and support, IT infrastructure adjustments, course development, human resources, marketing & sales budget etc. The option is to create a new program accounting budget or to have a program development costs absorbed in an existing P&L. With Financial planning comes an estimate of starting budget, launch budget, maintenance budget, EBITA goals and targets.

2 **Relook at the (academic) program content**

Program development is a critical, if not the most significant stage where, if you are not clear about your rationale, a lot of ambiguity will arise. A common mistake is to make technology the most dominant driver, however, in a change process this is the moment where you want to critically (re)view the program content, didactical approach and delivery structure.

Questions to ask:

1 - Is the content of your program still up to date and meeting market demand?
2 - Does the program have a student-centered approach?
3 - Is the program built on active learning, self-study, problem solving, creation, collaboration and construction;
are students triggered to adapt to new skills and gain new experiences?
4 - Are you inclusive of transformative learning?

Transformative learning, means meeting the needs of the knowledge society. It emphasizes the roles played in education and the didactical aspects of education that need to change, before actually moving towards technology implementation itself.

The role of a teacher needs to change, the student takes much more ownership and direction, and the content/knowledge application and assessment (should) have a (direct) relevance to our society. It is no longer the teacher who drills down on theoretical frameworks, but rather the collaboration between peers. A lot of schools make the mistake of having a desire is to reshape and innovate the learning experience but technology by itself won't do that.

A digital transformation roadmap16

3 Decide on program design and delivery*

Within this step, there is a never-ending list of important issues that need attention. Here are the most common:
- LMS: Learning Management System.

It is most likely that your institute will already have an LMS. If so, decide whether this one is sufficient and meets your new program needs. In case of starting from scratch, it is a very important step in your digital transition to make sure you know the possibilities and limitations before becoming "attached" to an LMS that is not meeting your needs. Deciding on an LMS depends on the depth of the learning projects and Infrastructure. To set up blended learning or to use e-Learning facilitation, the LMS is the foundation framework to host all content and user data.

- Make a market benchmark, or look online for all the comparisons available on LMS features.

- Define your own selection criteria and measure the LMS against this.
Develop your own market benchmark: Which LMS's are out there and what do they do? What is the difference between an LMS and CMS?. Second, create a group benchmark: What are partners using, how easy is it to interface, would the LMS eliminate other software accesses? Third, be precise on your selection criteria for the specific shortlist of your preferred LMS systems. Some criteria to look for: Scalability, UX friendly, SCORM compliant, interface of other systems (with i.e. student/user data, link to your admission, CRM, financial programs). Look at the costs, data ownership, contract conditions, service and license conditions; compare development and customization options.

A digital transformation roadmap17

*Design & Delivery is a crucial step and entails much more details than this roadmap provides.

- Instructional design - Course design - Graphic design.
In-house expertise or outsourcing?
In case of outsourcing, make sure you understand what a potential partner can deliver. If a partner has no experience in didactics and instruction in (academic) learning, you need to have an internal person as part of this development. Depending on the complexity, a complete team could consist of Educational Instructional Designers, Graphic Designers, Content Experts, LMS expert, and a Project lead who controls the delivery method, costs and timeline.
Once defined, if the right people/partners are in place, a more in-depth look is needed to create the right design with the right UX for users as well as creators and facilitates. Pay attention to rules and benchmark for desired audience/persona's.

Make sure that whatever is created in different software can be exported and integrated in or directly on your LMS (for instance, check SCORM compliancy).

But before starting the creative process of graphic design, make sure there is alignment about how the generic corporate identity online (visual & structure) needs to look like. Make sure you follow the quality & control standards or create a plan on how assessments need to take place, how much instruction & contact sessions will be needed, is this either adaptable in the design or does it need to be "locked in" up front? Blended, in class, online, synchronous, asynchronous decisions have an impact on the design.

4 **Align, assign, hire or train resources**

With the development and change into any form of digital learning, it is important to look at your key resources that are going to work/deliver and facilitate in the online environment. What are the responsibilities of each member and do they have the right skills and tools in place to realize these requirements? In the decision stage, responsibilities and expectations of your human resources need to be formally established and communicated. This will also lead to the decision if you need extra resources and support for the execution of your plan.

Depending on the complexity of your e-Learning plans, a strategy for renumeration, training or re-organization needs to be in place. Often digitalization projects fail as the people who have to do the actual work have not been involved, they lack the skills or understanding, which is reflected in fear and resistance. If your organization as a whole needs to change, make sure your key resources are the ambassadors and springboard for each division that is involved. Do not just "presume" or "expect" things to fall in place: you should leave the decision stage with a clear plan in place for your human resources that are affected by this change.

⑤ The need for a go-to-market plan:

Recruitment - Market Positioning – CRM – Admissions - Finance.

In the decision stage, it is important to already create a framework for your "go-to-market" strategy and get people from student recruitment, admission, marketing and student finance on board.

Task list

What are the academic requirements to enter the program, the level, the duration and the way of delivery? This will have an impact on your market potential or at least it will determine the leads you will be generating and the candidates you are converting into students.

Create clarity on the potential audience and create personas based on entry limitations but also on entry potential.
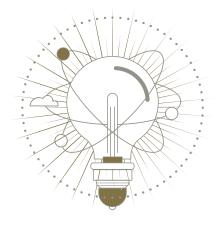
Start by creating program-specific communication tools, focus on the USP's, and make sure program facts are clear and understood by your M&S team (e.g., duration, intake date, delivery, price, admission requirements, work load, etc.).

 If you are working with a CRM system and inbound marketing and sales, this is the moment to already prepare a customer communication plan and how see what the enrolment process looks like. The program needs to be created in whatever ERP system you are using aligned with the customer cycle process, admissions and financial accounting.

⑥ Retention

Depending on the complexity of your e-Learning plans, it is known that for online/remote programs the question of retention is much more important than on-campus programs. If you are moving into this direction for the first time, a retention plan and student support team needs to be in place.

Remote students need to feel part of your program and they need answers to their academic questions within 24 hours and desired ad-hoc answers to technical questions within 8 hours.

Implementation

Plan responsibilities and objectives
for post-launch

The last, but also the most crucial step before your launch, is to plan in advance the delivery and implementation. After the design stage, a clear plan, transparency on responsibilities and objectives should be defined and made ready to move onto the implementation. Resource upskilling, debugging of the program, preparing for the "what if" scenario. In this step you build a solid foundation for a successful launch.

Essential tasks at the implementation stage:

① Program – Customer infrastructure

In the decision stage, you decided on the delivery and infrastructure of the program. In this stage, it is time to implement the links and make sure that there is a logical flow in the customer life cycle, before enrolment, during studies and after care. If you are launching a high-end digital learning program, your customers also expect that they can do their enrolment online. The set-up and implementation of missing or insufficient digital processes needs to be solved.

② Staff/Faculty development

Resources involved in the digital learning plans will be part of the preparation and training process. They are gathering new skills and confidence before the actual launch takes place. It depends on the complexity and size of your project whether there's a need for changes in your faculty and support staff, however, in general, those who transit from class-based to online teaching do go through a significant change.

Also, your student support team will have to deal with totally different challenges; they will be dealing with online students versus campus students. Make sure "test runs" are part of your implementation plan. Who is contacted when a student in a 9-hour different time zone is not able to access their exam? Sometimes students go silent, also known as "dormant students"; they are still part of the program but are barely seen online. These students are likely to drop out. Part of the implementation stage is that a plan is in place for following up on those students, giving them that human contact that is sometimes necessary to motivate them to get back on track.
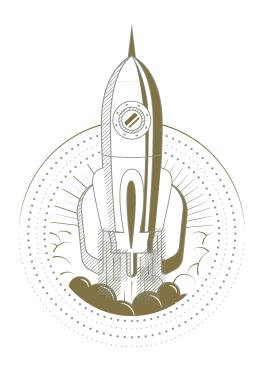
Anouk Tenten

A digital transformation roadmap 23

③ Go(ne)-to-market marketing & sales plan

In the previous stage, a generic go-to-market plan was created. In the implementation stage, this plan becomes operational with action items, budget and timelines. SEO mirrored websites, landing pages, campaigns, PR & Communication are several key elements that will be part of your marketing strategy; whereas for the Sales people, a flow of the entire process will be laid out.

⌨ Questions to ask:

1 - Is there a B2C or a B2B approach expected from your sales people? Are they doing inbound or outbound sales? Is the customer journey clear?

2 - As lead generation and the speed of your student conversation takes time, it is crucial to take (depending on program) several months before launch to have a complete actionable go-to-market Sales and Marketing plan in place.

Launch

Get the project off the
ground

If done well, all the hard work in each
step of the digital roadmap will pay
off. A lot of digital transitions are not
running as planned and even in the
launch stage, some things might still
not be in place or are not yet fully
operational. It is key that the
customer does not really notice these
imperfections.

Essential tasks at the launch stage:

❶ Go back to your business & project planning

If all has gone well, the project planning moves into execution stage and after- care. It is still important to measure risk and control potential changes (delays or bugs in the process). It is also important to show the goals, milestones and KPIs that have been achieved. Reflection and adjustment of costs and budgeting are in this stage significant for the financial business reporting of the entire "project".

❷ Execute Marketing & Sales

If executed well, a multichannel approach for lead generation is up and running and a potential sales pipeline is filling up. Conversion for the first cohort is taking place and students are prepared for their new study journey. However, this is the moment for an ongoing lead generation, nurturing and conversion plan. Based on early analytics, tracking of the lead generation sources, volume, quality, conversion % and conversion time, will give an indication of velocity and enhance the planning for your marketing and sales decisions.
If your program relies on B2B partnerships, it needs to be taken into account that these relationships and contract agreements often take more time.
Also, B2B clients may have special conditions that require adjustments in the delivery or administration of your program. If, for example, your program is offered as an L&D program to staff, individual performances apart from academic measures need to be in sync with the organization's need. Data privacy, ownership and accreditation are to be taken into account.
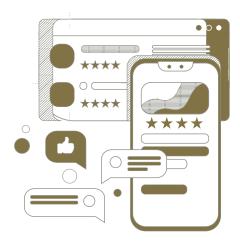
③ Performance of admissions & student support

The admission and student support play in important role in the launch stage. The are after-sales/ recruitment people are still the key contact for your students. Follow- up on paperwork, proof of payments, scholarships, visas if needed, etc. If there are changes in your program delivery, this entire process will be different than for on- campus students. Depending on whether your program runs fully online, the communication will all be digital and the customer/student experience is sensitive in this stage. It is important that students know who to contact. In the launch stage, you have to monitor if this process runs satisfactory, as it will determine the entire experience of your students.

④ Faculty – not to be forgotten

In the launch stage, the faculty need to be reassured and supported in the primeur of teaching in a new format or new content. It is good to pay extra attention in the launch stage to your teaching staff. Make sure there is room for continued support, training, feedback and reassurance. Also, from a quality standpoint, it would be advised to have program managers involved in the launch stage and make sure the program is delivered as promised. Faculty should not be the contact persons for technical support or financial queries. Registration of student performance and assessment needs to be monitored and probably documented in the student files/ERP system for official registration, quality & control of accreditation bodies.

Redefinition

Assessment, optimization and reevaluation

When your program is up and running, is successfully meeting the cohort targets, and has increased efficiency in the entire process, it is time to review and redefine.

Essential tasks at the redifine stage:

① Scale

In the redefinition stage of a program, it is still vital to keep track of the right analytics, any risks or mitigations. It is important to establish a correct way to put analytics in place and report on the right numbers. Financial projections, long term project KPI's, enrolments, CPL, CPE, retention, velocity and the overall product life cycle projections. Scale the entire process and the next stages of the product life cycle after the launch. Maybe this is the moment where cost accounting is reviewed and the program can reach P&L independence. It is however important to realize that with most online programs, students pay what they "consume", hence the continuity on support resources remains essential.

At this stage, it's a good idea to look at the potential of making the production scalable and re-use content, resources and investments for other programs. Once the costs have been made for an LMS, software, content development, Infrastructure and training, it is wise to look at continuity and a potential of scalability

② Re(de)fine now

After the first year, a refinement of the plan might be needed to re-adjust projections (ROI, EBITA, due to positive or negative market trends, unforeseen impacts). It may be good to keep a 5 - year planning in mind for an online program development that includes budgets for program updates, software updates, resource changes, etc.
At some point, the program might reach its "maturity" and it is possible to make the customer life cycle more efficient, this could potentially reduce the entire costs per enrollment and increase profitability. Alternatively, the program is in decline and needs to be re-adjusted to market demand.

3 Support & updates

After a while not only content, but software licenses and other infrastructure might need updates or integrations. If you are running a cohort, it should be planned in advance so that students are not hindered in their study experience. If the decision is made to terminate a program, potential students and alumni need to be addressed about the consequences.

Are you ready to build your e-learning plan?

Written by

Anouk Tenten

Senior Project Manager Sales and Digital channels EHL Group

Discover our
INVEST IN EDUCATION
toolkit

*This overview aims to outline a generic idea of how to plan from ambition to maturity. For each planning stage of your roadmap, consultants and experts from EHL Advisory are available to help you.