



## Preliminary Media Analysis Step by Step Guide



## **ADVISOR Enterprise User's Guide**

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## Foreword

ADVISOR Enterprise is a Training Management System that drives training efficiency by (a) aligning current and future training activities to operational requirements to identify gaps, duplications and training with minimal value; (b) forecasting and comparing the costs of viable delivery options; (c) uncovering cost drivers; and (d) improving resource allocation. ADVISOR is built around the ADDIE model with the added flexibility of starting the analysis at any level. ADVISOR is made up of the following modules that can be used separately or in any combination.

<b>Needs Assessment</b>	<b>Assess:</b> To find out <i>“the cause of the problem and potential solutions”</i> . Provides a step by step approach for understanding a problem before selecting the solution – in other words, before assuming that training is needed. Needs Assessment provides an audit trail and serves as the foundation for decisions by zeroing in on the source of the problem, identifying solutions that can produce the desired level of productivity, and highlighting actions that will generate the greatest impact. [Scope and Needs Assessment].
<b>Training Analysis</b>	<b>Analysis:</b> To find out <i>“who needs to be trained, on what and why”</i> . Provides a step by step approach for conducting Training Needs Analysis (TNA) or Training Systems Requirements Analysis (TSRA) to identify training needed by each job, position and employee to perform duties to the desired standard under the prescribed conditions. Four approaches may be used to conduct training analysis, namely Mission, System, Competency or Job. [Mission Analysis, Competency Analysis, System Analysis, Job Task Analysis, Knowledge/Skill Gap Analysis and Training Requirements Analysis].
<b>Training Design</b>	<b>Design:</b> To find out <i>“what is the most effective and economical way to deliver training”</i> . Provides a step by step approach for conducting Training Media Analysis (TMA) or Option Analysis to identify the most cost effective strategy for the delivery of training and generates Training Plans. The analysis takes into account limitations, instructional design requirements, upfront and recurring costs over training program life as well as risks associated with the introduction of new technology. [Media Analysis, Cost Analysis and Training Plans].
<b>Fidelity Analysis</b>	<b>Develop:</b> To find out the <i>“fidelity requirements of training devices”</i> . Provides a step by step approach for assessing the functional requirements of trainers and simulators based on training needs and performance objectives. It identifies visual, tactile, olfactory, affective and auditory sensory cues needed to practice tasks, within realistic environments, under preset conditions to attain the desired level of competency. In addition, ADVISOR takes into account elements within the virtual world and how users interact with each.
<b>Resource Management</b>	<b>Implementation:</b> To find out <i>“how much money and resources are needed”</i> . Compiles and analyzes missions/goals, competencies, systems, jobs, tasks, training requirements, courses, activities, costs, personnel and resources to generate concise, up to date and actionable reports. The reports provide insight on planned training activities for any time period; training requirements for each job/employee; budget, personnel and resource requirements, training impact as well as how to drive training effectiveness and efficiency by leveraging technology, improving resource allocation and identifying gaps, duplications and unwarranted training. [Forecast and Optimize Training Budgets, Personnel and Resources].
<b>Project Management</b>	<b>Implementation:</b> To find out <i>“how training should be implemented”</i> . Provides a step by step approach for planning a project and tracking progress in real time. This includes the setup of phases and tasks, dependencies and constraints, timelines as well as the assignment of personnel and resources needed to complete. Moreover, ADVISOR tracks progress by comparing hours worked and money spent on each task to project plan, to anticipate delays, facilitate the implementation of corrective measures, and keep projects on-time and within budget. [Develop Project Plans and Track Progress].

**Performance  
Analysis**

**Evaluation:** To find out “*how training impacts performance and organizational goals*”. Provides a step by step approach for improving performance by zeroing in on the source of the problem and identifying solutions that can produce the desired level of productivity. Moreover, ADVISOR highlights actions that will generate the greatest impact by assessing the feasibility of implementing plausible solutions as well as forecasting the costs, benefits and Return on Investment (ROI) of each intervention. [Performance Gap Analysis, Root Cause Analysis and Cost Benefit Analysis].

**Training Life  
Cycle  
Management**

**Manage:** To “*continually uncover venues to drive training effectiveness & efficiency*”. Maintains training effectiveness and efficiency over time by continually assessing the impact of changes to missions, jobs, tasks, systems, policies, technologies, throughput, and so forth on training content and activities; as well as budget, personnel and resource requirements. This is attained through a digital-twin model that continually aligns training activities to operational requirements to identify gaps, duplications and training with minimal value. Results (personnel/resource requirements for any time period; cost drivers; bottlenecks and deficiencies) are quickly and concisely communicated through dashboards. Actions that drive training effectiveness and efficiency are also highlighted.

## TABLE OF CONTENTS



<b>1.</b>	<b>Setup Courses</b> .....	<b>1</b>
1.1	Introduction .....	1
1.2	Setup New Course .....	2
	Input General Course Information .....	2
	Define Instructional Requirements .....	3
	Identify Cost Factors .....	4
<b>2.</b>	<b>Review Analysis and Results</b> .....	<b>5</b>
2.1	Review Instructional Design Rating.....	5
2.2	Review Costs .....	7
2.3	Review Cost Distribution Charts .....	8
2.4	Review Recommendations.....	10
<b>3.</b>	<b>Generate Course Report</b> .....	<b>11</b>
<b>4.</b>	<b>Annex A: Description of Key Data Items</b> .....	<b>13</b>
A.1	Course Info Tab .....	13
A.2	Instructional Requirements Tab.....	14
A.3	Cost Factors Tab .....	21




## Chapter 1: Setup Courses

### 1.1 Introduction

Two approaches can be utilized to perform a Media Analysis within ADVISOR: Preliminary Course Analysis or Detailed Course Analysis.

Preliminary Course Analysis uses the Data Collection Wizard to quickly assess the feasibility and potential savings that may result from using alternate delivery options. This approach is highly effective in analyzing courses with a single learning objective/outcome. Key data is collected under the  **Data Collection Wizard** and submitted for analysis. Preliminary Course Analysis is simple to use, assesses the viability of alternate delivery options within few minutes, and the analysis can be easily refined under the  **Course Analysis** folder. In other words, Preliminary Course Analysis is best suited for quick analysis of courses with limited details and single learning outcome.

Comparatively, Detailed Course Analysis provides a more comprehensive analysis of course content to assess the feasibility of using alternate blends of delivery options. This approach is better suited for courses with multiple learning objectives/outcomes. To facilitate the forecasting of development, hardware, administrative, management, travel, instructors, facilities, transmission, maintenance and support costs; Templates can be created and made available to all analysts. In addition to speeding the analysis process, Templates preserve consistency, as well as facilitate carrying out multiple “what if scenarios”. Detailed Course Analysis is carried out under  **Course Analysis** folder.

The current guide presents a step by step process for conducting Preliminary Course Analysis to identify the most cost effective delivery option. For details on all media analysis covered by ADVISOR Enterprise, please refer to the Training Design User Guide. Separate Step-by-Step Guide is available for conducting Detailed Course Analysis, and therefore will not be covered in this Step by Step Guide. For info on basic functionality and how to configure ADVISOR in line with needs, please refer to the Configure ADVISOR Step by Step or User Guide. Remember that context sensitive help for each screen is also available by clicking on **[Help]**.

## 1.2 Setup New Course

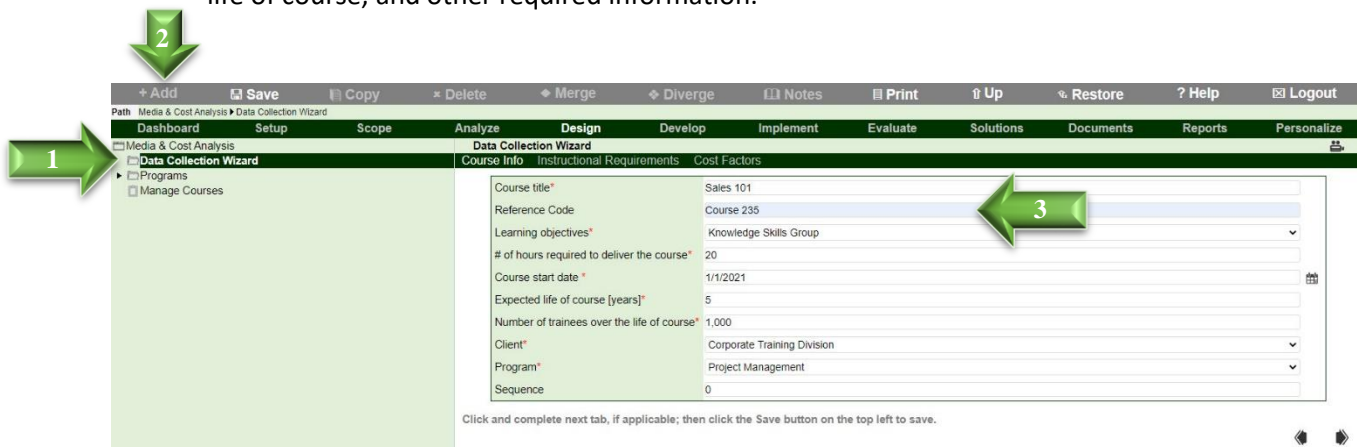
To evaluate the effectiveness and costs of alternate options for the delivery of training and recommend the most cost effective delivery option that meets organizational, learning and learners' needs, begin by setting-up the Course under the Data Collection Wizard. To setup a new course:

### Input General Course Information

**Step 1:** Click on the  **Data Collection Wizard** folder.

**Step 2:** Click **[Add]**.

**Step 3:** Input the course title, the primary learning outcome/objective of the course, start date, expected life of course, and other required information.



The screenshot shows the 'Data Collection Wizard' interface. A green arrow labeled '1' points to the 'Data Collection Wizard' folder in the left sidebar. A green arrow labeled '2' points to the '+ Add' button in the top toolbar. A green arrow labeled '3' points to the 'Course title\*' field in the 'Course Info' tab.

Data Collection Wizard	
Course Info	Instructional Requirements
Course title*	Sales 101
Reference Code	Course 235
Learning objectives*	Knowledge Skills Group
# of hours required to deliver the course*	20
Course start date *	1/1/2021
Expected life of course [years]*	5
Number of trainees over the life of course*	1,000
Client*	Corporate Training Division
Program*	Project Management
Sequence	0

Click and complete next tab, if applicable; then click the Save button on the top left to save.

### Notes:

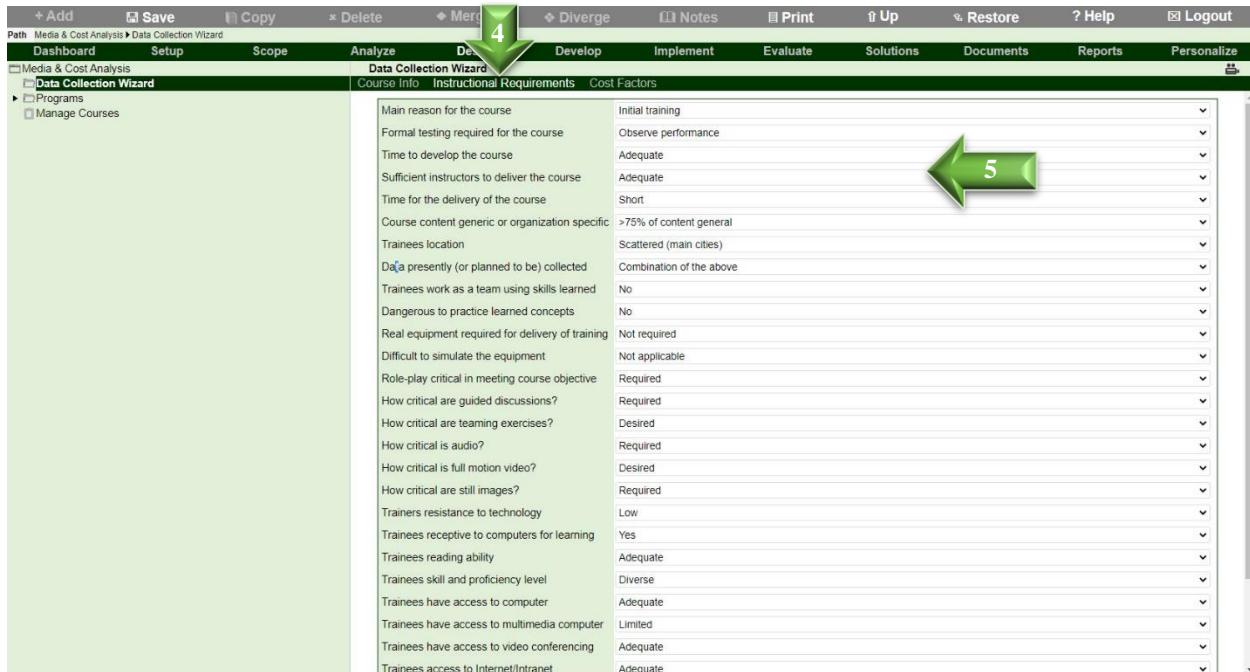
- If the Course has multiple learning outcomes, then you may either select the most dominant category or divide the Course into several Groups and analyze each Group separately under the Course Analysis Folder (refer to Media Analysis Step-by-Step Guide for details).
- All fields with an asterisk (\*) should be completed. But of course, the more data you provide the better the results.
- Context sensitive help for each screen is also available by clicking on **[Help]**.



## Define Instructional Requirements

**Step 4:** Click on the [Instructional Requirements] tab.

**Step 5:** Input requested information, including the main reason for the course, whether formal testing is required, availability of time to develop the course, instructors' availability and other required information. Detailed description of each field is provided in Section A.2 and can also be viewed by clicking on [Help].



Course Info	Instructional Requirements	Cost Factors
Main reason for the course	Initial training	
Formal testing required for the course	Observe performance	
Time to develop the course	Adequate	
Sufficient instructors to deliver the course	Adequate	
Time for the delivery of the course	Short	
Course content generic or organization specific	>75% of content general	
Trainees location	Scattered (main cities)	
Data presently (or planned to be) collected	Combination of the above	
Trainees work as a team using skills learned	No	
Dangerous to practice learned concepts	No	
Real equipment required for delivery of training	Not required	
Difficult to simulate the equipment	Not applicable	
Role-play critical in meeting course objective	Required	
How critical are guided discussions?	Required	
How critical are teaming exercises?	Desired	
How critical is audio?	Required	
How critical is full motion video?	Desired	
How critical are still images?	Required	
Trainers resistance to technology	Low	
Trainees receptive to computers for learning	Yes	
Trainees reading ability	Adequate	
Trainees skill and proficiency level	Diverse	
Trainees have access to computer	Adequate	
Trainees have access to multimedia computer	Limited	
Trainees have access to video conferencing	Adequate	
Trainees access to Internet/Intranet	Adequate	


### Note:

- You are not required to answer all fields, however, the more data you provide the better the results.

## Identify Cost Factors

**Step 6:** Click the [Cost Factors] tab.

**Step 7:** Input requested information, including the % of course that changes each year, annual salary of individuals taking course, average number of trainees and instructors per class, % of trainees and instructors that travel to course and other required information. Detailed description of each field is provided in Section A.3 and can also be viewed by clicking on [Help].


**Step 8:** Click [Save] to save the data and create the Course under the  **Course Analysis** folder.



Click and complete next tab, if applicable; then click the Save button on the top left to save.

% of course that changes each year	5 %
Annual salary of individuals taking course	\$ 55,000
Organization fringe benefits factor [%]	10 %
Average number of trainees per class	22
Average number of instructors per class	1
% of trainees that travel to course	25 %
% of instructors that travel to course	25 %
Average per diem cost per individual [per day]	\$ 250
Average travel cost per individual	\$ 1,000
Average instructor annual salary	\$ 78,000
Average consulting fee per class	\$ 3,500
If course exists, present delivery method	Instructor-led (Classroom) <input type="checkbox"/>
Effort required to develop course	Low to Medium <input type="checkbox"/>
Average cost of room rental per class	\$ 300
# of administrative days required [per class]	2.5
Cost of computer/hardware required by course	\$ 2,500

### Notes:

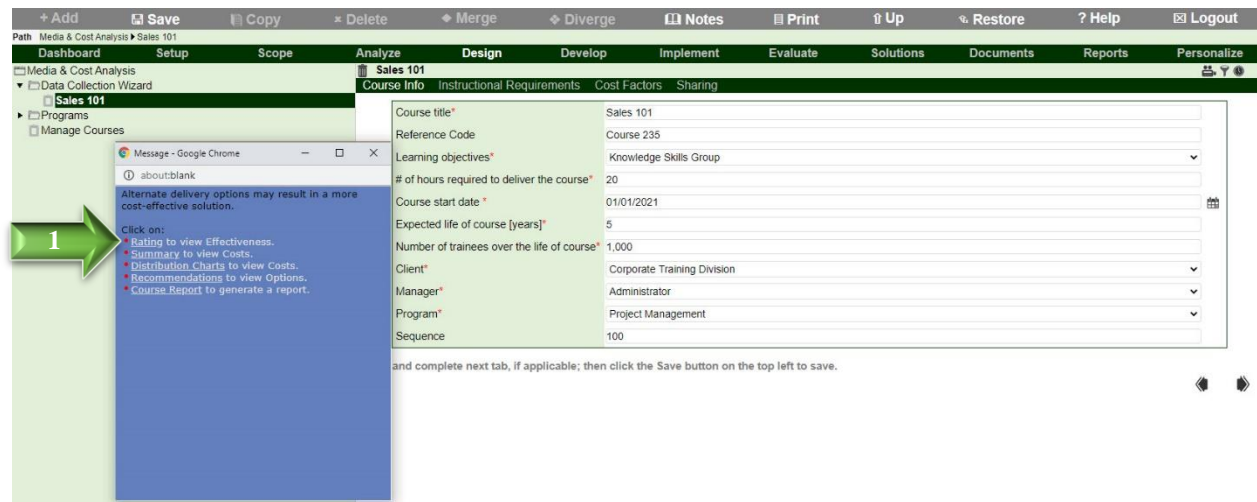
- You are not required to respond to all questions, however, the more data you provide the better the results.
- You may also share course data with colleagues (i.e., Users assigned to the same Client) by clicking on the [Sharing] tab, placing checkmarks next to their names and clicking [Save].
- To view and/or modify the preliminary analysis, click on ► next to  **Course Analysis** folder. A list of available courses including those generated by the Data Collection Wizard is presented. For details, please refer to the Media Analysis Step-by-Step Guide.

## Chapter 2: Review Analysis and Results

A blue pop up box with five options/hyperlinks appears after you save the Data Collection Wizard. To view the results of the analysis:

### 2.1 Review Instructional Design Rating

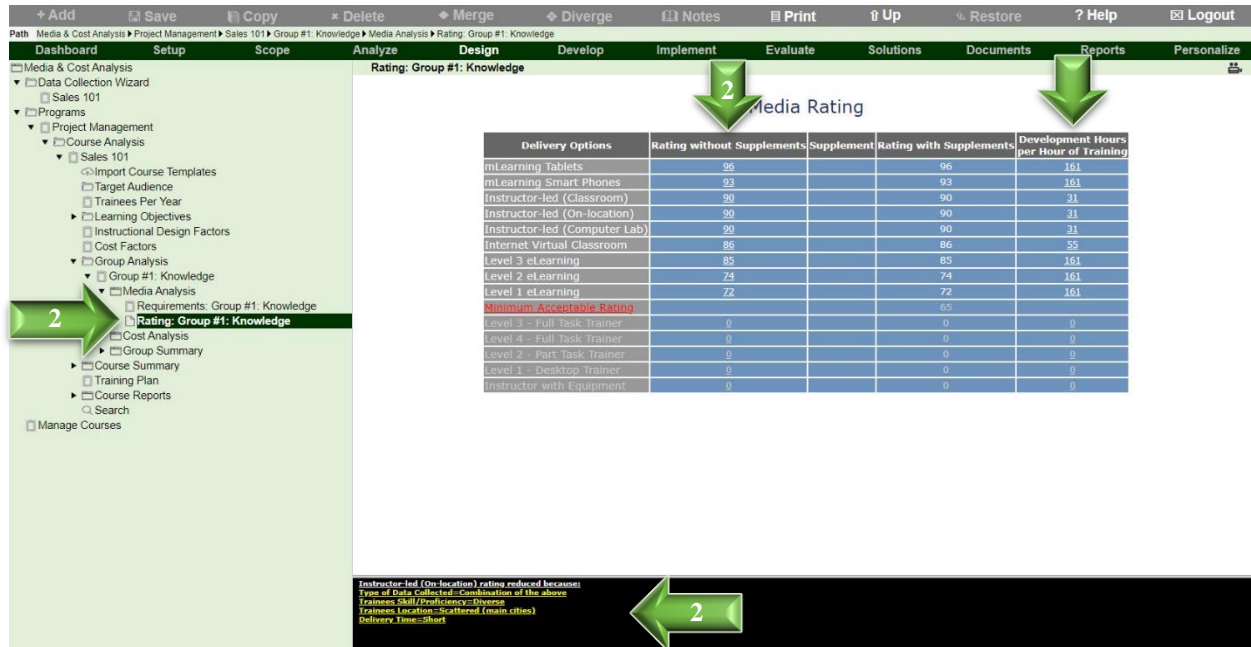
**Step 1:** To find out which delivery options are viable, and how well they meet organization, learning and learners' needs, click on the **[Rating]** Hyperlink.



The screenshot shows the ADVISOR software interface. The top menu bar includes options like Add, Save, Copy, Delete, Merge, Diverge, Notes, Print, Up, Restore, Help, and Logout. The main menu has tabs for Dashboard, Setup, Scope, Analyze, Design, Develop, Implement, Evaluate, Solutions, Documents, Reports, and Personalize. The 'Analyze' tab is selected, and the 'Course Info' sub-tab is active. The 'Course Info' form contains fields for Course title\*, Reference Code, Learning objectives\*, # of hours required to deliver the course\*, Course start date\*, Expected life of course [years]\*, Number of trainees over the life of course\*, Client\*, Manager\*, Program\*, and Sequence. A blue pop-up box with a green arrow labeled '1' points to the 'Rating' hyperlink in the pop-up menu. The pop-up menu also includes links to 'Summary to view Costs', 'Distribution Charts to view Costs', 'Recommendations to view Options', and 'Course Report to generate a report'.

ADVISOR automatically rates all supported delivery options (Configure ADVISOR Step by Step Guide, Section 2.4) – i.e., media's ability to meet organizational, learning and learners' needs – based on data provided under the **[Instructional Requirements]** tab. A 100% rating indicates that the delivery option meets all stated requirements. A 0% rating indicates that the delivery option did not meet a critical requirement and should not be considered any further.

**Step 2:** To find why a delivery option is not recommended or why its rating has been reduced, click on the rating next to the delivery option. The reasons are presented in the window at the bottom of the screen – based on provided information.






Path: Media & Cost Analysis > Project Management > Sales 101 > Group #1: Knowledge > Media Analysis > Rating: Group #1: Knowledge

Media Rating

Delivery Options	Rating without Supplements	Supplement	Rating with Supplements	Development Hours per Hour of Training
mLearning Tablets	96		96	161
mLearning Smart Phones	93		93	161
Instructor-led (Classroom)	90		90	31
Instructor-led (On-location)	90		90	31
Instructor-led (Computer Lab)	90		90	31
Internet Virtual Classroom	86		86	55
Level 3 eLearning	85		85	161
Level 2 eLearning	74		74	161
Level 1 eLearning	72		72	161
Minimum Acceptable Rating			65	
Level 3 - Full Task Trainer	0		0	0
Level 4 - Full Task Trainer	0		0	0
Level 2 - Part Task Trainer	0		0	0
Level 1 - Desktop Trainer	0		0	0
Instructor with Equipment	0		0	0

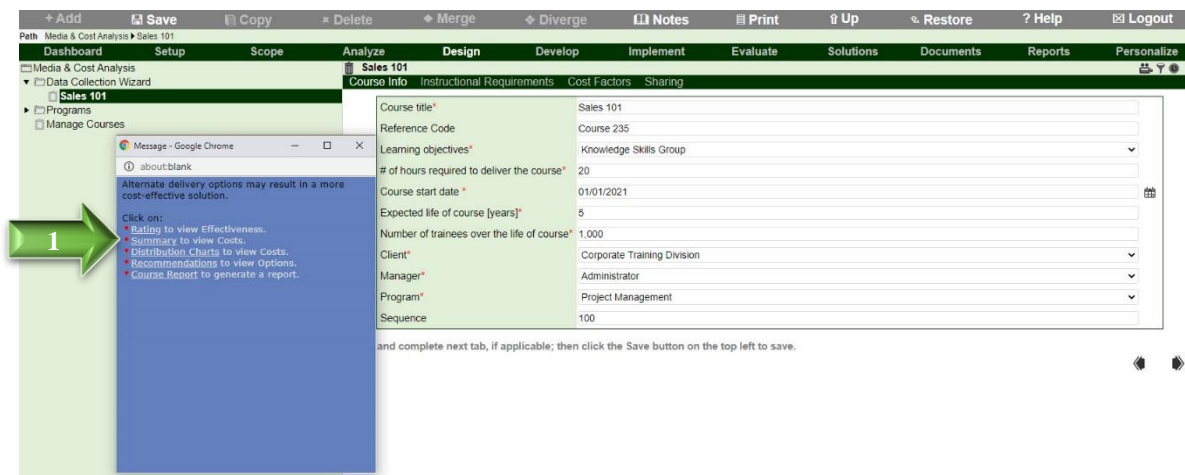
Instructor-led (On-location) rating reduced because:  
 Type of Data Collected: Combination of the above  
 Trainees Skill/Proficiency: Diverse  
 Trainees Location: Scattered (main cities)  
 Delivery Time: Short

### Notes:

- Based on industry averages, the number of hours needed to develop one hour of training is also presented next to each media.
- To modify the Minimum Acceptable Rating, click on the  **Acceptable Rating** node, click the unlock  icon to edit the Acceptable Rating field and lock  your value, and click **[Save]**.

## 2.2 Review Costs

**Step 1:** To view a summary of the costs of viable delivery options, click on the **[Summary]** Hyperlink.



The screenshot shows the ADVISOR software interface. The top navigation bar includes tabs like Dashboard, Setup, Scope, Analyze, Design, Develop, Implement, Evaluate, Solutions, Documents, Reports, and Personalize. The 'Analyze' tab is active, and the 'Course Info' sub-tab is selected. The main content area displays course details for 'Sales 101', including Reference Code, Learning objectives, # of hours required, Course start date, Expected life of course, Number of trainees, Client, Manager, Program, and Sequence. A green arrow labeled '1' points to the 'Summary' hyperlink in the left-hand navigation pane under 'Media & Cost Analysis'.

ADVISOR forecasts the costs of viable delivery options based on data provided under the **[Course Info]** and **[Cost Factors]** tabs. This includes total Development, Hardware, Administrative, Trainees, Instructors, Facilities, and Maintenance Costs. Furthermore, you can view direct (budget related) costs, indirect (productivity related) costs, savings that may result from utilizing alternate delivery options, start-up and recurring costs, as well as personnel and resources required to design, develop, deliver, administer and maintain this Course.

**Step 2:** To view **[Direct/Indirect]** costs, potential **[Savings]**, **[Up-Front]** and **[Recurring]** costs, as well as **[Resources]** and **[Personnel]** required click on the corresponding tabs.



The screenshot shows the ADVISOR software interface with the 'Summary: Group #1: Knowledge' tab selected. The main content area displays a table of costs for different delivery options. A green arrow labeled '2' points to the 'Summary: Group #1: Knowledge' hyperlink in the left-hand navigation pane.

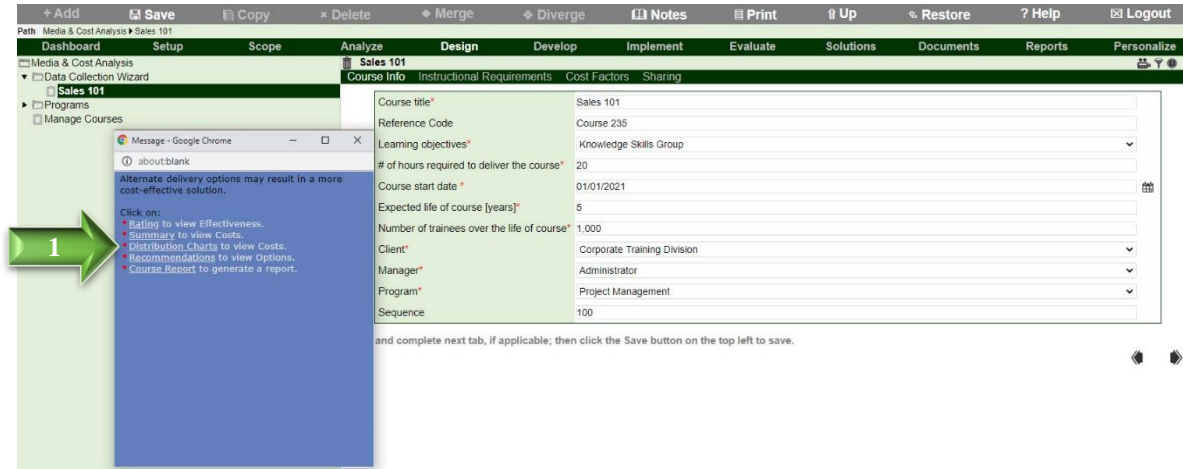
	Development Costs	Courseware Costs	Hardware Costs	Administrative Costs	Management Costs	Trainees Costs	Instructors Costs	Facilities Costs	Hardware Operation Costs	Transmission Costs	Maintenance Costs	Support Costs	Total Costs	Total Costs (PV)	Total Number of Trainees	Cost per Trainee	Cost per Trainee (PV)
mLearning Tablets	\$ 150,133	\$ 0	\$ 2,500	\$ 46,630	\$ 0	\$ 657,609	\$ 46,630	\$ 0	\$ 0	\$ 0	\$ 30,027	\$ 0	\$ 933,529	\$ 933,529	1,000	\$ 934	\$ 934
Instructor-led (Computer Lab)	\$ 28,908	\$ 0	\$ 2,500	\$ 46,630	\$ 0	\$ 1,192,120	\$ 249,731	\$ 15,000	\$ 0	\$ 0	\$ 5,782	\$ 0	\$ 1,540,670	\$ 1,540,670	1,000	\$ 1,541	\$ 1,541
Internet Virtual Classroom	\$ 51,288	\$ 0	\$ 2,500	\$ 46,630	\$ 0	\$ 657,609	\$ 221,630	\$ 0	\$ 0	\$ 0	\$ 10,258	\$ 0	\$ 989,915	\$ 989,915	1,000	\$ 990	\$ 990
Level 3 eLearning	\$ 105,093	\$ 0	\$ 2,500	\$ 46,630	\$ 0	\$ 460,326	\$ 0	\$ 0	\$ 0	\$ 0	\$ 21,019	\$ 0	\$ 635,568	\$ 635,568	1,000	\$ 636	\$ 636

### Note:

➤ To find out how each item (Development Costs, for example) is computed, click on the corresponding **[Development]** node. You may also edit any field and click **[Save]** to re-compute.

## 2.3 Review Cost Distribution Charts

**Step 1:** To view a graphical representation of the costs of viable delivery options over the life of the course, click the [Distribution Charts] Hyperlink.



**Step 2:** To export the reports to MS Word or pdf, or print click on the corresponding icon.

**Step 3:** To view a detailed cost breakdown of a delivery option, click on its title.



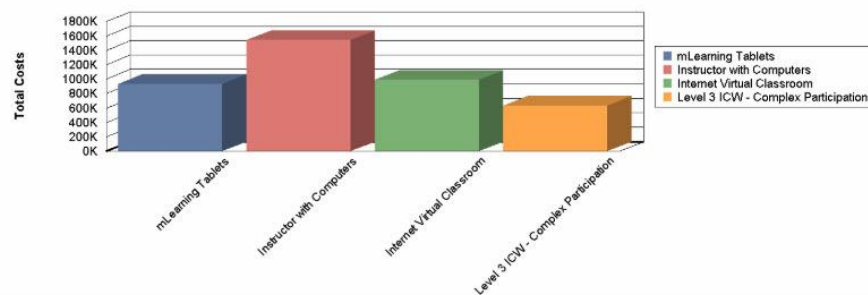
### Cost Breakdown

Course Title: Sales 101

Prepared by: Administrator

Date: July 15, 2020

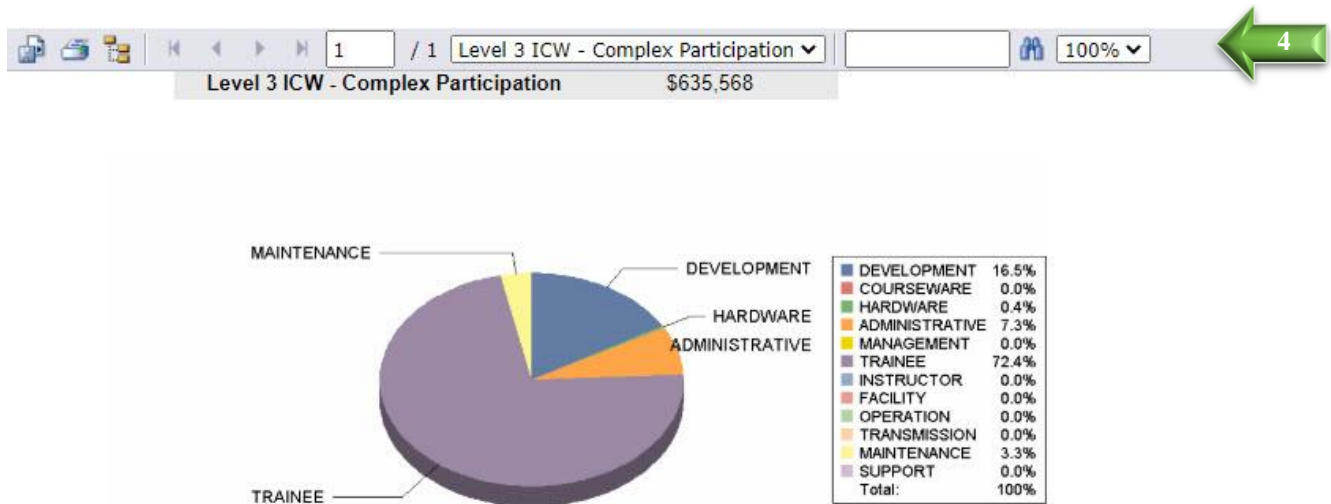
#### Delivery Options Costs





Delivery Option	Total Cost
mLearning Tablets	\$933,529
Instructor with Computers	\$1,540,670
Internet Virtual Classroom	\$989,915
Level 3 ICW - Complex Participation	\$635,568



**Step 4:** To return to ADVISOR, close the Report Window.



Note:

- Graphical representations of direct (budget related) costs as well as indirect (productivity related) costs are available under the  **Direct/Indirect Charts** node.
- Graphical representations of disbursements of costs over time including breakeven point and potential savings that may result from using a new delivery option in comparison with the current delivery option is presented under the  **Break Even Point Charts** node.

## 2.4 Review Recommendations

**Step 1:** To view ADVISOR's recommended delivery option, click on the [Recommendations] Hyperlink.



Path: Media & Cost Analysis > Sales 101

Dashboard Setup Scope Analyze Design Develop Implement Evaluate Solutions Documents Reports Personalize

Media & Cost Analysis

Data Collection Wizard

Sales 101

Programs

Manage Courses

Course title\* Sales 101

Reference Code Course 235

Learning objectives\* Knowledge Skills Group

# of hours required to deliver the course\* 20

Course start date \* 01/01/2021

Expected life of course [years]\* 5

Number of trainees over the life of course\* 1,000

Client\* Corporate Training Division

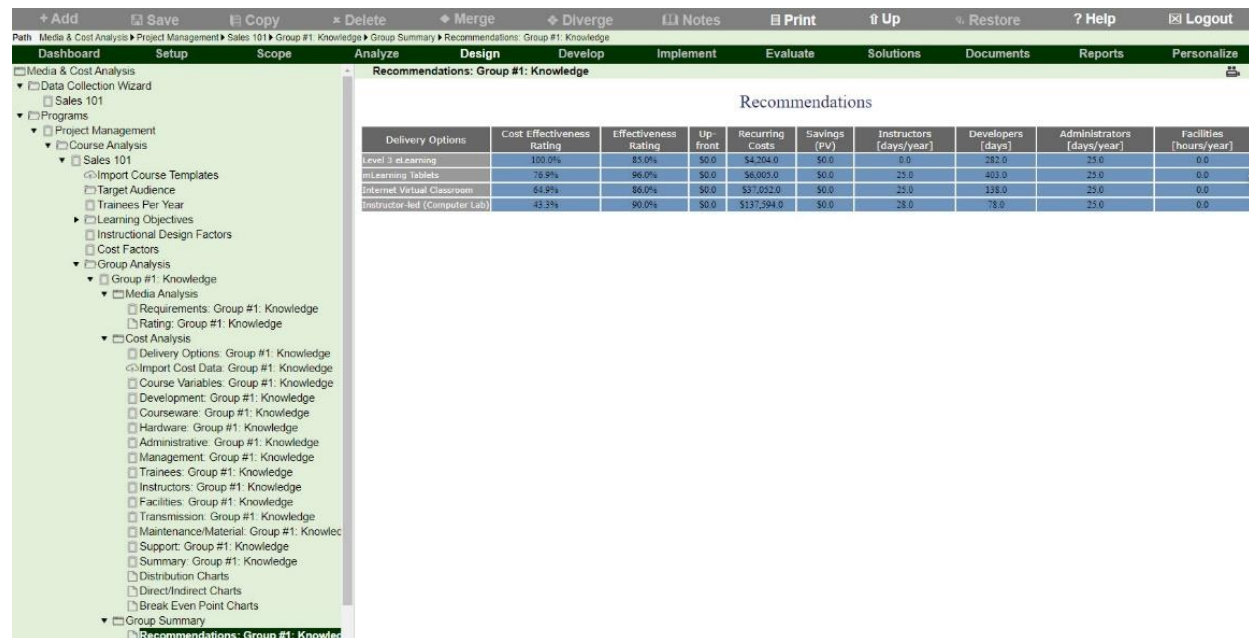
Manager\* Administrator

Program\* Project Management

Sequence 100

and complete next tab, if applicable; then click the Save button on the top left to save.

**Step 2:** Delivery Options are presented from most to least favorable. In addition to presenting cost effectiveness and effectiveness rating, up-front and recurring costs are also presented, along with potential savings, and personnel and resource requirements.



Path: Media & Cost Analysis > Project Management > Sales 101 > Group #1: Knowledge > Recommendations: Group #1: Knowledge

Dashboard Setup Scope Analyze Design Develop Implement Evaluate Solutions Documents Reports Personalize

Media & Cost Analysis

Data Collection Wizard

Sales 101

Project Management

Course Analysis

Sales 101

Import Course Templates

Target Audience

Trainees Per Year

Learning Objectives

Instructional Design Factors

Cost Factors

Group Analysis

Group #1: Knowledge

Media Analysis

Requirements: Group #1: Knowledge

Rating: Group #1: Knowledge

Cost Analysis

Delivery Options: Group #1: Knowledge

Import Cost Data: Group #1: Knowledge

Course Variables: Group #1: Knowledge

Development: Group #1: Knowledge

Courseware: Group #1: Knowledge

Hardware: Group #1: Knowledge

Administrative: Group #1: Knowledge

Management: Group #1: Knowledge

Trainees: Group #1: Knowledge

Instructors: Group #1: Knowledge

Facilities: Group #1: Knowledge

Transmission: Group #1: Knowledge

Maintenance/Material: Group #1: Knowledge

Support: Group #1: Knowledge

Summary: Group #1: Knowledge

Distribution Charts

Direct/Indirect Charts

Break Even Point Charts

Group Summary

Recommendations: Group #1: Knowledge

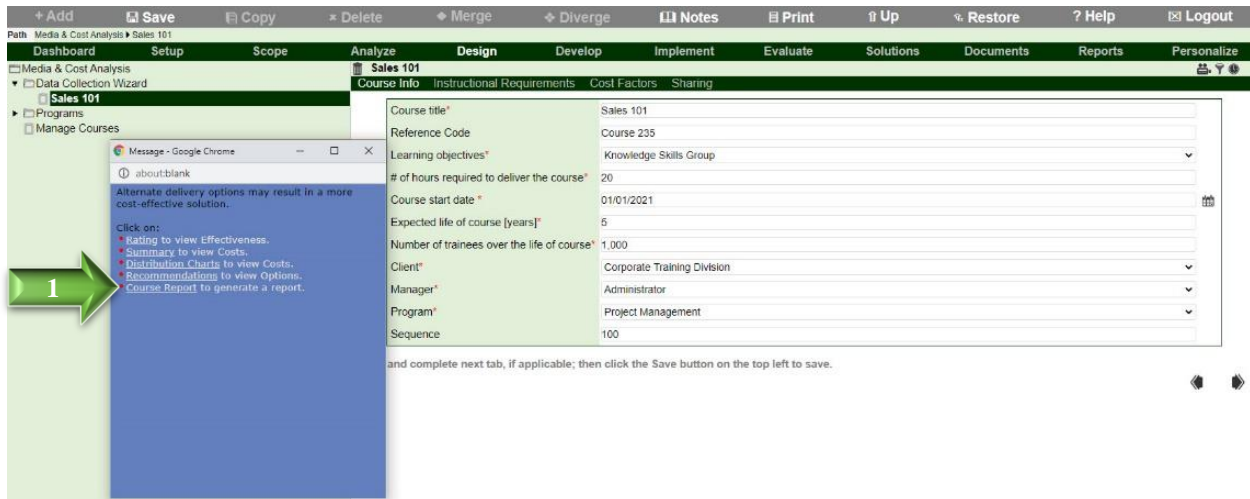
Recommendations

Delivery Options	Cost Effectiveness Rating	Effectiveness Rating	Up-front	Recurring Costs	Savings (PV)	Instructors [days/year]	Developers [days]	Administrators [days/year]	Facilities [hours/year]
Level 3 eLearning	100.0%	85.0%	\$0.0	\$4,204.0	\$0.0	0.0	282.0	25.0	0.0
eLearning Tablets	75.9%	96.0%	\$0.0	\$6,005.0	\$0.0	25.0	403.0	25.0	0.0
Internet Virtual Classroom	64.9%	86.0%	\$0.0	\$31,652.0	\$0.0	22.0	138.0	25.0	0.0
Instructor-led (Computer Lab)	42.3%	90.0%	\$0.0	\$137,294.0	\$0.0	28.0	78.0	25.0	0.0



## Chapter 3: Generate Course Report

**Step 1:** To generate a comprehensive report of all course attributes including reasoning behind media rating, cost breakdown and recommendations, click on the **[Course Report]** Hyperlink.



The screenshot shows the 'Course Info' form in the Advisor Enterprise application. The left sidebar contains a tree view with the following structure:

- Media & Cost Analysis
  - Data Collection Wizard
  - Sales 101** (selected)
    - Programs
      - Manage Courses

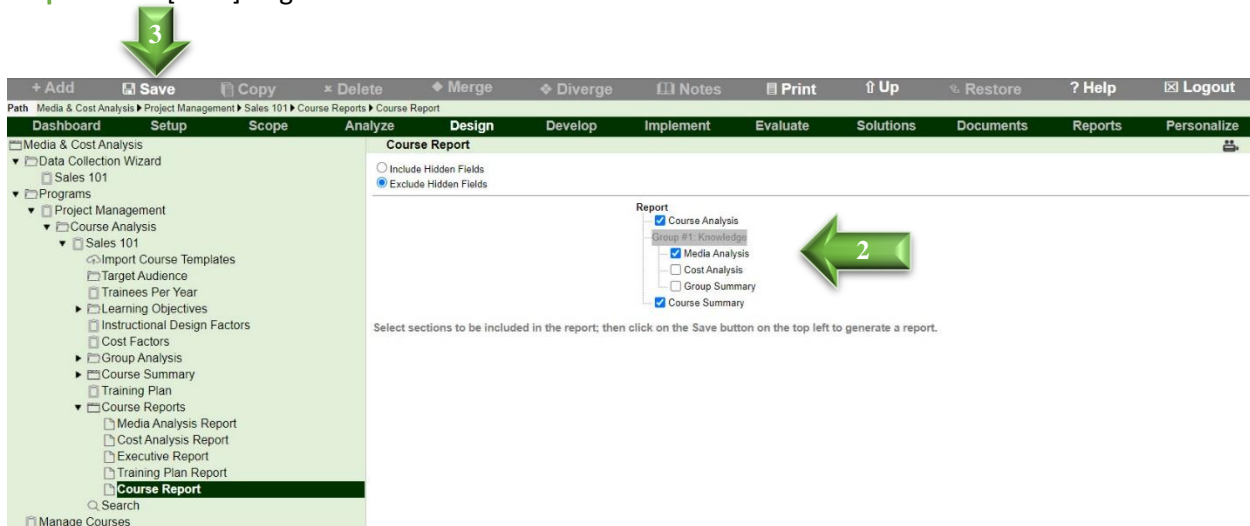
A green arrow labeled '1' points to the 'Course Report' link in the 'Manage Courses' sub-menu. The main form displays the following data:

Course title*	Sales 101
Reference Code	Course 235
Learning objectives*	Knowledge Skills Group
# of hours required to deliver the course*	20
Course start date *	01/01/2021
Expected life of course [years]*	5
Number of trainees over the life of course*	1,000
Client*	Corporate Training Division
Manager*	Administrator
Program*	Project Management
Sequence	100

Below the form, there is a message box that reads: "Alternate delivery options may result in a more cost-effective solution. Click on: Rating to view Effectiveness, Summary to view Costs, Distribution Charts to view Costs, Recommendations to view Options, Course Report to generate a report." A green arrow labeled '1' points to the 'Course Report' link in this message box.

**Step 2:** Select items to be included in the Course Report by placing checkmarks next to the desired items.

**Step 3:** Click **[Save]** to generate.



The screenshot shows the 'Course Report' configuration screen. The left sidebar contains a tree view with the following structure:

- Media & Cost Analysis
  - Data Collection Wizard
  - Sales 101
    - Programs
      - Project Management
        - Course Analysis
          - Sales 101
            - Import Course Templates
            - Target Audience
            - Trainees Per Year
            - Learning Objectives
            - Instructional Design Factors
            - Cost Factors
            - Group Analysis
            - Course Summary
            - Training Plan
            - Course Reports
              - Media Analysis Report
              - Cost Analysis Report
              - Executive Report
              - Training Plan Report
              - Course Report** (selected)

A green arrow labeled '2' points to the 'Course Report' link in the 'Course Reports' sub-menu. The main form displays the following configuration options:

Course Report

☐ Include Hidden Fields  
☒ Exclude Hidden Fields

Report

- ☒ Course Analysis
- ☒ Group #1: Knowledge
- ☒ Media Analysis
- ☐ Cost Analysis
- ☐ Group Summary
- ☒ Course Summary

Below the configuration options, there is a message box that reads: "Select sections to be included in the report; then click on the Save button on the top left to generate a report." A green arrow labeled '3' points to the 'Save' button in the top left corner of the form.

## Notes:

- Since the report is in html format, you can quickly advance to any section by clicking on the corresponding title in the Table of Contents. You may print or save the report using the corresponding functions in your Browser. To return to ADVISOR, close the Report window.

Generate Word Doc




### Course Report

Sales 101

Course Manager: Administrator  
Prepared by: Administrator  
Date: 16 July 2020 11:40 AM  
Currency: Canadian Dollar

### Table of Contents

- Course Analysis
  - Course Analysis
    - General
    - Archive
    - View
    - Delete
    - Recover
  - Target Audience
  - Trainees Per Year
    - Trainees Per Year
  - Learning Objectives
    - Sales 101
  - Instructional Design Factors
    - Content
    - Audience
    - Limitations
    - Hardware
    - Application
  - Cost Factors
    - Trainees
    - Transmission
    - Capability
    - Expectations
- Group #1: Knowledge
  - Media Analysis
    - Media Analysis

Remember that context sensitive help is also available for each screen by clicking on **[Help]** and video clips on how to perform specific functions by clicking on the video  icon.

Enjoy!

## Annex A: Description of Key Data Items

For your reference, a brief description of data required for preliminary media analysis – requested under the  (**course title**) node under the  **Data Collection Wizard** folder – is presented below.

### A.1 Course Info Tab

Course Title	Maximum 200 characters.
Learning objectives	What is the learning outcome/objective of this course? If more than one, what is the most dominant category?
# of hours required to deliver the course	Estimate the number of hours required to deliver the course in an instructor-led format.
Course start date [dd/mm/yyyy]	Indicate the expected delivery date of the course. If the course exists, then use today's date as a reference point.
Expected life of course [years]	Over how many years can the course be delivered before it becomes obsolete, irrelevant or requires major changes? If the course exists, estimate the remaining life, using today's date as a reference point.
Number of trainees over the life of the course	Estimate the number of learners over the life of the course. If the course exists, estimate the number of learners using today's date as a reference point.
Client	Specify the Client for this course.
Manager	Individual responsible for the course including media analysis and cost analysis. Data may be shared with colleagues.
Sequence	Indicate the order in which the courses should be presented. Number will be assigned in increments of 100, if none is provided.

## A.2 Instructional Requirements Tab

Main reason for the course

What is the main reason for the course?

- ☐ Certification; if employees (inspectors, for example) have to be certified each year.
- ☐ Initial training; if the course deals with new product, program or policy (for example).
- ☐ Recurring/Refresher; if employees are required to take the course each year (Hazardous Materials Handling, for example).
- ☐ Upgrade knowledge; if course advances trainees' existing knowledge (new features of Word 2019 for Word 2017 users, for example);
- ☐ Orientation; if it provides organizational overview for new employees, for example.

Impact: While Electronic Performance Support Systems (EPSS) provide effective means for upgrading the knowledge of employees, they are not suited for initial training, for example.

Formal testing required for the course

Is formal testing required for this course? If yes, what type of test is required:

- ☐ Performance based; requires instructor or SME to observe the performance of trainees (driving test, for example).
- ☐ Skill/Knowledge based; requires trainee to answer questions (multiple choice, solve problems, essay, etc.) that can be evaluated by instructor or SME at a later date.
- ☐ Oral presentation; if trainees are required to make a presentation and/or answer questions in real-time posed by a panel, for example.
- ☐ Essay writing; if trainees are required to write open-ended questions test.
- ☐ On the job; if trainees are evaluated by the supervisor on the job.
- ☐ Group projects; if trainees' evaluation is based on a group project

Impact: Self-study media such as Print and CBT are not adequate for performance-based evaluation; while some skill/knowledge based tests can be effectively carried out through computer based testing.

Time to develop the course

Is there a deadline for course development or updating – i.e., is time available to develop the course material?

- ☐ Critically short; if the course material is required within a three months period, for example, and the consequences of missing the deadline are high.
- ☐ Short; if the course material is required within a six months period, for example, and the consequences of missing the deadline are moderate.
- ☐ Adequate; if the development/revision time is flexible or the consequences of missing the deadline are not critical.

Impact: Options that require lengthy development effort such as Multimedia CBT or WBT may not be practical if the development time is critically short and the consequences of missing the deadline are high.

Sufficient instructors to deliver the course

Are there sufficient qualified instructors/subject matter experts to deliver the course in an instructor-led mode?

- ☐ Critically short; if the number of instructors/subject matter experts is very limited. In other words, few individuals have the necessary expertise; or too many resources (guest speakers, for example) are required to conduct "live training".
- ☐ Short; if the number of instructors/subject matter experts for the course is limited, but manageable.
- ☐ Adequate; if the number of instructors/subject matter experts for the course is adequate. In other words, adequate resources are available.

Impact: Classroom delivery may not be appropriate for training a large number of individuals scattered over a large geographic area in a short period of time, if few individuals are qualified to deliver the training.

Time for the delivery of the course

Does the course have to be delivered within a specific time period?

- ☐ Critically short; if the course has to be delivered as quickly as possible and the consequences of delays are high. Training sales force on a new product, or customer service staff on a new reservation system, for example.
- ☐ Short; if the course has to be delivered in a short, but manageable, time frame; and the consequences of missing the deadline are moderate.
- ☐ Flexible; if the delivery schedule is flexible. Although there may be benefits for acquiring the knowledge sooner than later, the consequences of the delay are minimal.

Impact: Classroom delivery may not be appropriate for training a large number of individuals scattered over a large geographic area in a short period of time, especially if few individuals are qualified to deliver the training.

Course content generic or organization specific

Is the course content generic or specific to the organization?

Impact: Off-the-shelf computer based training or web based training courses, for example, will not be available for topics specific to the organization.

Trainees location

Are trainees local or spread over a large geographic area?

- ☐ Widely scattered; if the course is offered to individuals all over the world or in remote areas.
- ☐ Scattered; if the majority of trainees are located in main cities within the same country.
- ☐ Local; if the majority of trainees work within the same city/region.

Impact: Asynchronous delivery options, such as Video Conferencing are not practical if trainees are located in the same city/region.

Data presently (or planned to be) collected

Is the collection of data required? If yes, which data should be collected?

Impact: A Learning Management System, for example, may provide an effective and economical option for collecting and compiling scores, surveys and comments.

Trainees work as a team using skills learned

Do trainees (on the job) work as a team when using skills learned in the course?

Impact: Delivery options, such as Classroom, that can simulate the working environment may be better suited for courses that require trainees to work as a team.

Dangerous to practice learned concepts

Is it dangerous for trainees to practice learned concepts – how to regulate a high voltage panel, for example?

Impact: Delivery options, such as CBT, that can simulate dangerous activities may be better suited for the delivery of training.

Real equipment required for the delivery of training

Is equipment (excluding computers and simulators) required for the delivery of training? In other words, does the course deal with the operation, maintenance or support of equipment – such as removing, installing or troubleshooting an engine, flying an airplane. If the answer is yes, then is this equipment required for the delivery of training?

Impact: Complexity of equipment may impact plausible delivery option.

Difficult to simulate the real equipment

Can the functionality of the equipment be simulated?

- ☐ Very difficult; if simulator/trainer is required. Flying an airplane or operating a crane, for example.
- ☐ Difficult; if it involves a complex process, such as diagnosing problems and repairing equipment.
- ☐ Moderate; if it involves the simulation of a software program, for example.
- ☐ Easy; if it involves the simulation of paper forms, for example.

Impact: Complexity of simulation may impact plausible delivery option. CBT or WBT, for example, are not suited for developing psychomotor skills on complex equipment.

Role play critical in meeting course objectives

Would trainees' benefit from role-playing and problem solving – i.e., experience various outcomes? How important is it towards achieving the learning objectives?

- ☐ Required; if the course deals with attitude change and trainees value the opinion and experience of colleagues.
- ☐ Desired; if colleagues' opinion and experience add value to the course, but not critical.
- ☐ Not required; if colleagues' opinion and experience has minimal impact on the course.

Impact: Synchronous delivery methods, such as Classroom, that allow the exchange and sharing of views are better suited for courses that deal with behavioral or attitude change.

How critical are guided discussions?

Would trainees' benefit from guided discussions, i.e., expressing opinions, sharing experiences and knowledge? How important is it towards achieving the learning objectives?

- ☐ Required; if course deals with attitude change; and trainees value the opinion and experience of colleagues.
- ☐ Desired; if colleagues' opinion and experience add value to the course, but not critical.
- ☐ Not required; if colleagues' opinion and experience has minimal impact on the course.

Impact: Synchronous delivery methods, such as Classroom, that allow the exchange and sharing of views are better suited for courses that deal with behavioral or attitude change.

How critical are teaming exercises?

Would trainees' benefit from teaming exercises – i.e., work as a group to apply specific knowledge? How important is it towards achieving the learning objectives?

- ☐ Required; if trainees work as a team when using learned skills.
- ☐ Desired; if trainees do not work as a team; however, colleagues' opinion and experience add value to course.
- ☐ Not required; if colleagues' opinion and experience has minimal impact on the course.

Impact: Synchronous delivery methods, such as Classroom, that can simulate the working environment may be better suited for skills that are utilized in a team setting.

How critical is audio?

Would audio greatly enhance the learning experience, if the course is delivered in a self-study mode?

- ☐ Required; if course deals with language, music or radio communications, for example.
- ☐ Desired; if audio adds value to the learning experience.
- ☐ Not required, if audio has minimal impact on the learning experience.

Impact: Delivery options such as Multimedia CBT that allow the integration of audio in the training material, are better suited for courses that deal with language, music or radio communications.

How critical is full motion video?

Would full motion video greatly enhance the learning experience, if the course is delivered in a self-study mode?

- ☐ Required, if full motion video is required to transfer the knowledge, demonstrate a surgical procedure, for example.
- ☐ Desired; if video adds value to the learning experience.
- ☐ Not required, if video has minimal impact on the learning experience.

Impact: Delivery options such as Multimedia CBT that allow the integration of video in the training material, are better suited for courses that require realistic representation of events.

How critical are still images?

Would still images greatly enhance the learning experience, if the course is delivered in a self-study mode?

- ☐ Required, if pictures or still images are critical for transferring the knowledge, computer program controls, for example.
- ☐ Desired; if still images add value to the learning experience.
- ☐ Not required, if still images have minimal impact on the learning experience.

Impact: Delivery options that allow the integration of images in the training material are better suited for courses that require realistic representation of tools and equipment.

Trainers resistance to technology

Are instructors resistant to the use of technology for the delivery of training?

- ☐ High; if instructors are threatened by technology or believe that training can only occur in a classroom setting.
- ☐ Moderate; if instructors are not comfortable with technology.
- ☐ Low; if instructors are comfortable with technology or highly motivated to explore new options.

Impact: The effectiveness of synchronous delivery options, such as Internet Virtual Classroom, may be compromised if trainers are resistant to technology.

Trainees receptive to computers for learning

Are trainees receptive to the use of computers for the delivery of training?

- ☐ Yes; if trainees are using computers on-the-job or at home; and are confident in their ability to learn on their own.

Impact: The effectiveness of delivery options that utilize computers, such as CBT and WBT, may be compromised if trainees are resistant to technology.

Trainees reading ability

Is trainees' reading ability adequate?

Impact: Delivery methods such as Print, CBT and WBT, are not recommended for trainees with limited reading ability.

Trainees skill and proficiency level

How would you classify trainees' prior knowledge or skill of course content?

- ☐ Very diverse; if trainees have diverse educational background, knowledge or experience in this field.
- ☐ Diverse; if trainees have similar educational background but diverse knowledge or experience in this field.
- ☐ Uniform; if trainees have similar educational background, as well as knowledge and experience in this field.

Impact: Delivery options that allow trainees to advance at their own pace, such as CBT and WBT, are better suited for trainees with diverse knowledge and skill.



Trainees have access to computers

How would you rate trainees' access to computers?

- ☐ Adequate; if trainees have a computer at their desk or home.
- ☐ Limited; if trainees have to share the computer with others, at the learning center, for example.
- ☐ No access; if trainees have no or minimal access to a computer.

Impact: Methods that require computers for the delivery of training, such as EPSS, CBT and WBT, are not feasible if trainees have no access to a computer.

Trainees have access to multimedia computers

How would you rate trainees' access to multimedia computers?

- ☐ Adequate; if trainees have a multimedia computer at their desk or home.
- ☐ Limited; if trainees have to share the multimedia computer with others, at the learning center for example.
- ☐ No access; if trainees have no or minimal access to a multimedia computer.

Impact: Methods that require multimedia computers for the delivery of training, such as Multimedia CBT and WBT, are not feasible if trainees have no access to a multimedia computer.

Trainees have access to video conferencing

How would you rate trainees' access to video conferencing equipment?

- ☐ Adequate; if video conferencing facilities are readily available to trainees within the organization or through external suppliers.
- ☐ Limited; if trainees have to travel to gain access to the video conference facilities or availability is limited.
- ☐ No access; if trainees have no or minimal access to the video conference facility.

Impact: Methods that require video conference facility for the delivery of training are not feasible if trainees have no access to the equipment.

Trainees have access to Internet/Intranet

How would you rate trainees' access to the Internet and/or Intranet?

- ☐ Adequate; if trainees have a computer at their desk or home with access to the Internet and/or Intranet.
- ☐ Limited; if trainees have to share the computer connected to the Internet/Intranet with others, at the learning center for example.
- ☐ No access; if trainees have no or minimal access to Internet or Intranet.

Impact: Methods that require the Internet or Intranet for the delivery of training, such as WBT and Internet Virtual Classroom, are not feasible if trainees have no access to the Internet or Intranet.

Minimum acceptable internet connection speed

What is the Internet or Intranet connection speed that is available to trainees?

Impact: Delivery methods that require high bandwidth, such as Multimedia WBT, are not practical if trainees have a slow dial-up connection.

Application of  
learned skills

What is involved in the application of learned concepts/skills?

- ☐ Complex - decision making; if the course deals with problem solving and making decisions – how to repair a computer, for example.
- ☐ Cumbersome – computations; if the course deals with computations and/or report generation – preparing budgets or maintenance procedures for example.
- ☐ Critical; if correct application of knowledge is critical – i.e., errors have high consequences.
- ☐ Used infrequently; if the information in the course is used occasionally – how to file travel expense, for example.
- ☐ Used frequently; if the course deals with functions performed on daily basis or changing behavior/attitude.

Impact: Electronic Performance Support Tools may be better suited for complex or critical tasks, for example.

### 4.3 Cost Factors Tab

% of course that changes each year	Estimate the percentage of the course content that may change each year. The estimate should be based on the initial development effort [10% each year, for example]. Although a course may have a life span of three years, for example, 15% of the content may change each year.
Annual salary of individuals taking the course	Input the average annual salary of trainees [\$40,000, for example]. Data on average annual salary of trainees may be obtained from personnel or payroll department. Trainees' salaries are used to compute gained productivity if training can be completed in a shorter period of time.
Organization fringe benefits factor [%]	Input the organization's fringe benefits factor. This covers all expenses including employees' benefits such as medical and dental coverage; organization's contribution to pension and other funds; as well as general operational expenses such as rent, electricity, phone, security, etc. Fringe benefits factor generally varies between 25% to 75% of employees' salary. Data on the fringe benefits factor may be obtained from personnel or payroll department. Fringe Benefits Factor is used to compute the loaded costs.
Average number of trainees per class	Estimate the average number of trainees per class, if course is delivered in a synchronous mode.
Average number of instructors per class	Estimate the average number of instructors/facilitators per class, if course is delivered in a synchronous mode.
% of trainees that travel to course	Estimate the percentage of trainees that would have to travel to and from the course site, if course is delivered in an instructor-led format.
% of instructors that travel to course	Estimate the percentage of instructors/facilitators that would have to travel to and from the course site, if course is delivered in an instructor-led format.
Average per diem cost per individual [per day]	This includes reimbursable daily expenses for lodging, meals and tips. Data on average per diem costs may be obtained from payroll or accounting department.
Average travel cost per individual	This includes round-trip air, bus or train fare, local automobile mileage, taxi or local public transportation costs. You may average these costs for participants in the course. However, the method used to compute the average should be documented. Data on average travel costs may be obtained from payroll or accounting department.
Average instructor annual salary	Input the average annual salary of instructors/facilitators, if course is delivered in a synchronous mode. Data on annual salary of instructors may be obtained from personnel or payroll department.
Average consulting fees per class	Input the average consulting fees per class, if external subject matter experts, instructors or facilitators deliver course in a synchronous mode.
If course exists, present delivery method	Select method currently used to deliver the training, if applicable.

Indicate the effort required to develop the course, or convert to another delivery option, if it exists, as follows:

Effort required to develop course

- ☐ Low – a course that deals with a simple subject. The course content can be adequately presented in text, graphics and simple animation, if developed in an asynchronous mode. That is, it does not require complex animation, simulation, audio or video.
- ☐ Medium – a course that deals with a moderately complex subject. The course content requires text, graphics, animation, simple simulations, and some audio but minimal video, if developed in an asynchronous mode.
- ☐ High – a course that deals with abstract/complex subject that is difficult to comprehend. The course content requires text, graphics, complex animations and simulations as well as audio and video if developed in an asynchronous mode.

Average cost of room rental per class

Estimate facilities costs per class (hotel or conference center room rental, for example), if course is delivered in an instructor-led format.

# of administrative required [per class]

Estimate the number of days per class required to administer the course, if delivered in an asynchronous mode. This may include registering trainees, booking a room, arranging for equipment, etc. Note that this refers to working days and not calendar days.

Cost of computer/hardware required by course

Cost of special equipment (computers or trainers, for example) required for training. If remodeling the classroom is required, then the costs should also be included.