

The eLearning Coach Podcast #69
Set Yourself Up for Quality eLearning
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Connie: Hi, Hadiya. Welcome to the eLearning Coach Podcast.

Hadiya: Thank You, Connie. Happy to be here.

Connie: I recently found out that in addition to storytelling, you teach and write and present about quality assurance and quality control. So I'm really excited to speak with you about it because this is an important topic that doesn't get enough attention. Can you define quality assurance or QA to make sure we all have the same definition?

Hadiya: Yeah, and I think it's an important definition because it's distinguished from quality control in a couple of ways, which is one thing we talk about a lot and sometimes we use them interchangeably. Quality assurance, it's focusing on the ability of a process to produce or deliver a quality product or service. So this means making sure that along the way there are different interventions and different steps that are in place, different processes, tools, controls in place so that when you get to the end of the line you have a perfect product already.

Hadiya: As opposed to something like quality control, which is you go through your normal processes and then hope for the best at the end and have someone go through it to see whether or not you've made any errors and then you fix it at that point. So quality assurance is all about taking preventive steps and quality control is about what it looks like in the end.

Connie: That is an important distinction. Thank you. So can you tell me a little bit about the state of quality assurance in the eLearning industry?

Hadiya: Well, I teach a lot of classes for the association talent development. I also do other speaking events as well and I always no matter what slip in a question about, "How many of you have in your organization have a quality control or assurance team dedicated to you?" I don't mean the receptionist. I don't mean the guy with the eagle eye in accounting who can find anything. I don't mean that. I mean an actual team where it's in their title and they get paid to do only that. And as you can imagine with

those parameters, most people don't raise their hand, but every now and then there's a team dedicated I do find upon further questioning. And sometimes that breaks down a little bit that they're like, "Well, they're actually doing other stuff too" or something to that effect, but there are some out there that are dedicated to that.

Hadiya: I worked at an organization as a contractor that had a team dedicated to it as well. But what was interesting about that which is one of the problems is that there didn't seem to be any built-in mechanism to get that stuff to them. So that would mean, which is something we're going to talk about today that in the project plan that we would have to section off some time specifically for that product. Meaning that if it's due Monday, I shouldn't be working on it on Sunday night. It needs to be done two weeks ahead of time so I can go into this queue. And so a lot of the designers were like, "I can't do that. It's too much. I can't do both things. I need to just get this out and hope for the best or send it to of quality assurance at the same time that I'm doing."

Hadiya: And there was no consequence for not sending it to quality assurance. So it wasn't just the presence of a team. It was the full quality assurance process that made sure that team was incorporated every step of the way. For the rest of us, there isn't any. I also get one step down from that. I have peer review. So my concern with peer review is that taking a course is very different than testing a course. People that you have invited into your peer review process, bless their hearts, have their own job. And so what they're going to do nine times out of 10 is take the path of least resistance. You already know the path of least resistance because you built it and you were up to three o'clock in the morning just testing that path of least resistance.

Hadiya: You need someone who knows how to, and again, this isn't a talent that you're born with. It's something that you've learned of how to actually test a course. We've all run into those cut and paste errors that we have of where the wrong answer it looks exactly the same as the right answer. It just slips our mind that we did all of that. You need someone who's going to take the time to get all those answers wrong and see what that information looks like. And again, that's not something you're born with. That's a structured process and body of knowledge that someone has to

teach you. And then they have to document it. There's a whole process involved.

Hadiya: The next step down from that is that we're just doing it ourselves. And I think that is the biggest group of people. And I read somewhere something interesting that why is it so hard to check your own work? I mean, it isn't you. It's a nearly impossible thing. There are people who are really good at it and who just nail it every time and I'm so happy for them. I'm not one of those people who nailed it every time, but I read somewhere that one of the reasons why it's difficult to edit and review your own work is that when someone looks at your work for the first time, they're trying to understand it. So they're reading for understanding. They're trying to make sense of it so that it's easier to find errors.

Hadiya: You're not reading for understanding because you already understand it because you wrote it. So yeah, I saw this tweet the other day by this author who I followed for years named Daniel Jose Older and he's a writer and he wrote, "I swear, sometimes editing a book feels like the most hellish never-ending game of whack-a-mole ever."

Connie: Great.

Hadiya: And that's what it feels like, this whack-a-mole process that we're playing over and over and over again as the developers of this. So I would say that the state isn't good as far as having our own structured process which I think not only do we need, but we deserve. We deserve to have that.

Connie: And our audience does too, right?

Hadiya: Absolutely. Because at the end of the day, it's going to happen. There will be a quality control review. It's just you won't be doing it. It will be the learner. It won't be the client, it will be everyone but you, but it's going to happen. The question is how much control do you want over that and what is it going to do to the reputation of your team, and to the quality of the learning experience by having them encounter all these problems instead of you?

Connie: Mm-hmm (affirmative). One thing I was wondering about is how did you know that I copy and paste the correct answer three times and then rework it?

Hadiya: It's how we roll. It's what we do. It's what gets the job done as long as you remember that you did it.

Connie: Right, right. That's the worst when the client finds it. But I do want to ask you something about the process. You mentioned that it's a structured process at a high level. Can you talk about what that structured process is?

Hadiya: Yeah, there's several different lenses for this. So if I talk about the highest level of a manager who sees the need of this. Usually it's not the manager. It's maybe the senior instructional designer who sees the need for this and wants to say, "Okay, so how do I begin? How do I introduce quality control assurance into our team?" And I say there's like this five-step cycle and there are cycles within them. At the highest level, I just quickly go over ... There's commit, create, execute, integrate, and revise.

Hadiya: Quality assurance can easily be a solution and search of a problem, which means that you can't necessarily assume that there's a problem with what you're putting out as a team and that it is adversely affecting the organization in a way so much so that you want to spend time and resources dedicated to fixing it. You can probably make that assumption, but if you want the data you need to go out there and find it within your organization. That's another thing I found. I'd like to come up with these global recommendations, but at the end of the day it is by team, by process, by group, by course.

Hadiya: And so instead of giving people a handout that says this is what to look for, I teach them how to do that investigative work to find out at this organization how is this affecting us in the work that we do? And until you can, I'm a firm believer until you can articulate in some way that's going to resonate with leadership there will not be a commitment to this. Years ago I would say probably when SharePoint was probably at .0 version, I was working on a team and I thought, "Wouldn't it be great to come up with a knowledge base?" I was so ambitious back then over knowledge base. So I had all my little ideas of what I was going to do and then I remember

talking to a leader in the organization and told her what I was going to do. And she said, "That sounds like a great idea, but it sounds just like another thing."

Hadiya: I said, "What do you mean another thing?" She's like, "Well, just another thing." And of course I was very easily discouraged back then too. But then years later I realized what she was saying was that it's just another thing that we're going to say we're going to do and then not commit to it and not do it. We're not going and that's always stuck with me is how can you make sure that this is not some other just thing? And the only way you're going to do that is prove that it's worth working on.

Hadiya: They need to create the process, obviously. And within that creation, there are ideas around make sure it's realistic. That's one that you need to really look at people's workloads and be honest and say, "Look, either we're going to build more time into our development processes and be honest about that." We cannot reduce people's workload. I mean, whatever you can do, but you can't just lay this on the table and say, "This is what we're going to do." You have to look at how the process works already and see how you can integrate into this what needs to be changed.

Hadiya: And one other thing, there's a bunch of things under there, but there's another thing under there I think it's important is scope. When we say review, a lot of us are thinking of one thing, just the review process, but there's actually three reviews. There's the content review to make sure the content is correct. There is the design review to make sure that what's come together it supports learning. And then there's the technical review to make sure that all the buttons work, but we just say review. But those actually three very different things that when one isn't working can overshadow the other thing.

Hadiya: So your subject-matter experts who are doing content reviews get really wrapped up into comma control and really wrapped up into if this button works or that button works, but we don't really distinguish them. It's just one review and then we tell them, "Oh, don't worry. We'll fix all that later," but it becomes so distracting for some and it becomes too much. So I think they need to be acknowledged as three different wants. Then of course, then next down the after commit, create, there's execute.

Hadiya: So it's actually pulling the trigger and making sure that it works. And I think one thing about this execution in the next phase integration, there needs to be a consequence for not following quality control. Now obviously one of the consequences is that it sucks. So there's a consequence already for having a course that is not flawless and perfect, but it has to feel consequential that this is an important thing. I like to say that things will sometimes exception themselves out of existing, which means that there's so many exceptions. "Oh, well I'm not doing it this time because or I'm not following it this time because." And to the point where there's so many exceptions that no one's doing it. What's the point?

Hadiya: Then there's integration into your daily processes, especially for quality assurance. And I think a big one is time and also tools and templates to help alleviate some of the pressure of getting it perfect. And then revising it and starting all over again, it's a cycle recommitting to this new one. I mean, you can't really expect or assume that you're going to nail it the first time. Listen to your team that is working with you when they say that I would like to do this, but how am I going to do it when I have five projects at once? And at the end of the day, if they did it, they'd be able to move on to those other projects and they may not overlap as much. But you have to be able to prove that that's true in your team. Just saying it is not going to, to help.

Connie: And that was great, great information. I like having to stop and think about how people work and integrating it into the workflow because some people are working on a more agile project basis. And so they may have multiple shorter releases, short production time, a quick release. And they're going to need it just as much as someone who is doing a long, full development life cycle. And one of the places where I worked that did have it when I was contracting there, the person was a full-time tester and wrote a full test plan and they had the log sheets where they wrote down every error. And that's how software developers do it. And it seems obvious, but yet what can people do who may be a one-person team?

Hadiya: Well, I think first of all, I know as a one-person team myself, I tend to just quickly move on. I made an error. I mean, I know myself, I know the errors and I just quickly move on and don't think about or reflect how could I have prevented that? But yet it's the same. Like one of my favorites is in

storyline if I need to fix something in a particular graphic or some text, I will hide the two images on top and then forget to put them back and then publish. And then the client's like, "It seems to be a long pause on slide 13." I'm like, "I don't know what you're talking about. I didn't notice that." And then go back and fix it and say, "Is it better now?"

Hadiya: So know yourself, document those things and checklist, but for you. Go online and find some and then use it as a foundation, but don't just give up because it didn't work. Redo that checklist for your own specific needs. So I had that for each slide at the end and actually I use Smartsheet, and I developed this sheet where I have like these phases of when I checked it, how I checked it and what I checked for. Does it have audio? That's another big thing where on a layer of Storyline, you forgot to remove the robotic audio and put in the actual audio.

Hadiya: "Like on slide five when I click on this button it sounds different." I'm like, "Does it? I don't know what happened. Check your computer?" So I know the things that come up, I've been doing it so long. So I'm able to at this point come up with checklists of check all the layers, check for every slide. That's really the extent of it. And then eventually it becomes I'm still waiting for that moment, but eventually it becomes, it should become so innate that you don't need this checklist along the way.

Hadiya: I mean, I think that's one of the points of quality assurance is that you don't need quality control at the end because you have marched it through this sequence of events, but documentation, your own processes, knowing yourself and I think any sort of checklist that you can use along the way will help. And then if you get other people, you can hand them that checklist.

Connie: That's a great idea. And solo or small teams might be able to use freelancers to help with the functional review along the way.

Hadiya: I feel like we are software makers like we are making software. We're making the same decisions that they have to make as far as interface, how things interact and all of that. And they have a whole team of quality assurance people dedicated to that. You get a master's in quality assurance and yet we're just like, "Okay, I'm going to put this button here. That looks great. Anyway." One thing about it is that if I hit save on

Storyline, it's probably doing the same thing to the hard drive as it would if I hit save on Word. So that's save button has a function and interacts with the computer and it was like our software works outside of the computer. Like it all works the same.

Hadiya: For us though when you click on a button on a screen, it can do anything. Like there's no way of predicting how it's going to behave without us telling the person that when this happens, this is and by the time you do all that, you guys will test it like I'm about to test it myself. So that's why consistency is important too. I mean, so it's a whole thing. And that part of your quality assurance should be we have buttons do a similar thing. Not that everything looks the same, but those things are consistent at least if not through all our courses, but throughout the course. We should be sure that things behave in a consistent way so they can be tested.

Hadiya: A person who steps into a role like that would have to definitely sort of acknowledge the difference between testing something that has universal industry standard of behavior versus how it's going to act just on slide five and act differently on slide six and act differently on slide eight. So I think there's a real need for it if not a career, but like a certification like a strategy that we can all use as maybe individual professionals who have a free landscape who are doing that.

Hadiya: But also you as a person who works internal or external to have this skill as part of your cache that I know how to build quality assurance processes. I know how to bring them to life. I how to implement them. I know how to fix them based on a body of knowledge, not just on how you think things should happen.

Connie: Yeah, really good point. Why should an organization that wants to start doing QA, why should the whole process be formalized?

Hadiya: Well, I mentioned earlier that one of the goals or one of the positive outcomes of having quality assurance is that ultimately it reduces the need for quality control. Meaning that your clients, your learners, you don't have to keep going back and fixing errors in courses and you're not trapped in this course purgatory. I call it being course blind where you can't get yourself out of this course and you can't move on, and it never seems to end.

Hadiya: One of the ways of doing that is through repeated processes in documentation and learning from your errors. So the first time you do this, you send it through the process, and you get to quality control and realize that there are actually still a bunch of errors in this course, but you wouldn't be able to now go back and say, "How can we adjust our quality assurance process to prevent these types of errors?" Unless you document it and have someone paying attention to it. It's easy to just go ahead and fix it and forget about it. And think you forget that this was an issue that came up. Now after a couple of years of doing this, like I said, I mean, I know some of my key errors. But having it documented, having someone who is dedicated to ensuring the process works, you can only do that if it's formalized.

Hadiya: I think that we all acknowledge that we're all invested in that commitment definitely is only going to be there if you formalize it, document it opposed to saying what gets what gets done. And if it's just give it to George, he has some time. George does not have time. George has his own course to build. Peer review is the way through this and that's fine, but at least come up with a formalized way that people are going through this instead of just sending you an email. One thing to formalize in these processes are people going to review the course that's there or the course that's not there? What that means is it's easy to kind of go, "I don't like this activity, or this activity doesn't really work."

Hadiya: Okay, well, unless you have time to redo the course, there's a million ways to do an activity. There's a million ways. I don't want you to spend your time focusing on whether or not this goes into scope, whether or not you like an activity. I want you to spend your time seeing if the activity works. So that stuff has to be said and it has to be formalized and it has to be agreed upon that we're not going to be looking for stuff that isn't there. We're going to be looking at what's there and making sure it works as is.

Hadiya: Sure, if you want to make recommendations if this doesn't seem academically sound or whatever you want to do. But the point is to get a functioning course out the door to the people and trust the instructional designers to do what they do. But if you want to add another layer of review, you can, but just understand that that can't all happen two weeks before release.

Connie: Do you see the QC process happening after design, after storyboards and after production at different points in the process?

Hadiya: Each one of those steps are distinct. So my process is design documents, storyboard alpha, beta. So each one of those really could have their own quality control procedure involved in that. Because I want a storyboard to go out in a way that's coherent that makes sense. But yet, I wouldn't spend a whole lot of effort there because the subject-matter expert is going to edit and edit and edit and make changes. Your Microsoft Word or your Grammarly, whatever is the quality control you want to use there. As you go down the line, I think it should get more formalized. The process should be more stringent because they're expecting levels of completion.

Hadiya: So I think as a good idea is to sort of look at every phase. And again, however your team does it, look at every phase and think of, "What can we do now early on that we can assure that the final version?" Because that all starts with the storyboard. How can we assure or the design really, that the end product is going to be good? What can we do now? One is making sure that once you have gone through the storyboard process at the end of that, that the storyboard is error-free. It's really easy to have gone through the process so many times. You're like, "Just give me the storyboard, just give it to me." And just moving on because you got to move on at a certain point.

Hadiya: But the danger of that of course is that you may have all these errors in the storyboard that you hope you're going to catch when it's time to cut and paste it into Storyline, but you may not catch. So what does a process look like internally to seal off a storyboard and say, "Actually what I'm going to do instead is read through it again. I'm going to fix all the errors and I'm going to seal this in gold as this is that final perfect storyboard." That of course means that you need to take time to do that, but you want to move on to alpha. But the more you just move on the higher you're incurring risk that at the end you're going to have some issues along the way.

Hadiya: So it's for your team to define for you what is the safest way that we can move to the next level without incurring the risk of having errors at the end. And that's up to you to define that. And I think one thing to do is you can pay lip service and talk about it, but you really kind of have to go into

the courses and everyone's got to be honest about the errors that are showing up. I remember I had someone saying to me that our learners don't report errors. Like okay, reporting errors and there being errors are two different things.

Hadiya: First of all, do you have a mechanism for reporting errors? I mean, they may see all types of typos and there's no mechanism for the learner to say, I mean, you always get somebody who's like, "There's an error here, an error there" and then you kind of go, "Oh, jeez." So you may just fix the one error and not go through the whole course, but there's no reporting mechanism maybe for the person to go back and say, "This is a problem, or this link doesn't work." So just because they're not reporting them does mean that they don't exist.

Hadiya: So I say take a project and have someone an intern, save that for your intern or something like that. And go through those courses with a fine-tooth comb and then see. It looks like a lot of you aren't using apostrophes correctly or it looks like your directions aren't really clear on how to complete exercises or things like that. Or these buttons don't work, or this button doesn't even look clickable. Like some buttons have a level on it. Yeah. And others don't in the same course.

Hadiya: So have someone go through that and is a learner having a meltdown? They're just going to click on the button and go on with their lives. But ultimately having a predictable interface is a better idea than having an unpredictable one. And all this sets you up for having quality control people who can go in and say, "Yes, this works, this works because it looks like a button. It functions like a button. It's probably a button." So yeah, you got to take that time to do that as a side project.

Connie: You know, as an aside, one thing that I've noticed that it's showing up these oddball errors that you're talking thing about that actually weren't there originally in that transition from flash to HTML. It's showing up these odd errors in authoring tools. Somehow people just thought that you could just upload it and it would still be the same, but hey people, it's not. You really need to test it all over again. So how would you respond to people saying they just don't have time for implementing a program?

Hadiya: Well, the snarky answer is that pay now or pay later. Quality control is going to happen. It's just you won't be doing it. As I mentioned earlier, you're now delegating this to your subject-matter experts, to your sponsors, to your reviewers, to your learners ultimately. And is that what your team wants to do? Does that work for you, that delegation? I think the other part of it is that I'm not sure that's something that I can answer. What I do is I guide people through finding that answer for their own teams. Sure, generically, I mean there's a bunch of industries except for us that have quality control. The auto industry. They all have quality control.

Hadiya: And so you can find some statistics and some stats on how that has improved there, work all the time. Again, one of the key differences is that their stuff usually behaves pretty consistently and a consistent outcome. A motor works this way, and our stuff works differently and that we sort of decide how the PR people are going to interact with these things. So yeah, that's one of the differences. So there's data you can find about that, but you're not going to get commitment talking about the automotive industry and talking about because those people they don't see themselves in that way.

Hadiya: You are going to have to look at what are some of the data points that you can dig up information on. We have reviews. That's one way that information may be coming to you is any course reviews that are sort of jammed into that LMS that you may not have looked at for a while. Taken a survey of those review and seeing what frustrations they have, what they're complaining about. Sometimes they'll be generic. There was a bunch of errors in this course, but I think the guiding principle for them should be if you feel like there's an issue or if you know that a lot of your time is being spent.

Hadiya: And I think a lot of people don't talk about it either because they feel like it's just part of the job and there's nothing particularly special about it, but I disagree. I mean, I look at it through a couple of lenses. One lens is just our state of mind as developers and our sanity of going through these courses and whether or not it's a pleasant experience for us too. It's the lens of management who would be happy to clear our path to go on the next course and be able to definitively say, "This course is finished." And

not that you have to keep going back to this course while you've moved on to the other one.

Hadiya: And then there's the lens of the learner as well too, where the interface, all of that is invisible to them. And we don't have to be infringing on the cognitive load with all this other stuff that's in the way. So it's not just about you. I mean, it's something that affects the entire process and the entire experience that we're building for the learners, for management and for you.

Connie: That was a great way to wrap it up. Thank you so much, Hadiya. It was great talking to you about this.

Hadiya: Thank you. Thanks for having me, Connie.