



**THE INSIDER'S GUIDE  
TO BECOMING A RAPID  
E-LEARNING PRO  
FULLY REVISED EDITION**

By Tom Kuhlmann

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Building effective e-learning can be an exciting job, but it's not always easy. Over the last 20 years, I've met with e-learning developers in diverse industries all over the world, and many tell me the same thing: They're mostly working alone with limited resources and could use quick tips and resources to help them succeed. That's what motivates this e-book. I'll give you an insider's perspective on how to get results—and become a rapid e-learning pro.



## What's E-Learning?

But before we jump into the nitty gritty, let's come to a common understanding of what “e-learning” means. Some people think of e-learning as any type of electronic learning. That can include formal courses such as those created with Articulate's authoring tools, as well

as informal learning such as wikis, online discussions, and social media learning.

For the purposes of this e-book, I'll define e-learning in this way: E-learning means any type of self-guided, online course created with e-learning authoring tools.

## What's Rapid E-Learning?

Now that we've defined e-learning, let's tackle the term "rapid e-learning." It's one of those concepts that has several nuances.

For some, rapid e-learning is all about building just-in-time content quickly. Many organizations don't have time for a tedious production process, and the courses they need have short life spans. For these organizations, rapid e-learning means delivering the right course at the speed of business.

For others, rapid e-learning is all about software. In the past, you needed programming skills (and often a team of people) to build a self-guided, interactive course. Today, rapid e-learning software is easy enough for anyone to use. In that sense, rapid e-learning is all about software that empowers anyone to create e-learning without prerequisite programming skills.

I think both definitions are helpful. Rapid e-learning can signal both rapid production cycles and the type of authoring software you use. And I'd add that rapid e-learning is the ability to create courses without large production teams.

Now, if you're just getting started, rapid e-learning may feel like a pipe dream. You may be working by yourself with limited resources, and things don't seem so rapid. But don't worry. You'll be able to create e-learning without programming skills. And the speed will come with practice.

## What it Means to Become a Rapid E-Learning Pro

In the end, what really matters is producing results for your organization and your learners. And that's what becoming a rapid e-learning pro is all about. Rapid e-learning pros balance the needs of all stakeholders. They use e-learning technology to design effective courses that engage learners and look good. And thanks to the newest e-learning tools, I believe that doing so is easier than ever.

Years ago, if I wanted to build a simple drag-and-drop interaction, I'd need to meet with a programmer and then wait for her to build it. Even a simple interaction involved back-and-forth emails and meetings. Today, that's not an issue. For example, I can create a drag-and-drop interaction in [Articulate Storyline](#) in about 30 seconds. Not only does this save time,

it opens the door to more interactive e-learning. In the past, I might have forgone some interactions because I just didn't have time for the programmer to get involved. But now, because building interactions is relatively easy, I'm empowered to try different things and create better e-learning.



## Putting Together the Pieces

In this e-book, it's my goal to give you guidance on various aspects of rapid e-learning so that you'll also feel empowered to build engaging, interactive content. First, I'll explore how you can set yourself up for success by understanding your organization's and your learners' needs. Then, I'll provide tips on choosing the right technology to build your course. I'll also walk you through the basics of building interactive e-learning. Finally, I'll give you insight into how you can measure the success of your course.

# Setting Up for Success



Successful courses bridge the gap between your organization's and your learners' needs. Your organization commissions you to build a course to meet its goals. On the other hand, learners taking the course expect it to help them reach their own goals. It's your job to build a course that satisfies both the needs of the organization (your customer) and the learner (the ultimate consumer of the course). Let's look at how you can do that.

## Focus on Results

Organizations focus on results, and so should you. It's crucial that you identify the results your customer wants—and then create a course that delivers them. It sounds obvious, but you'd be surprised by how many courses aren't successful because they aren't aligned with what the customer actually needs.

A lot of e-learning developers measure success by completing a course and delivering it; or they measure success by having a certain number of participants take it. Those are elements of success, but ultimately it means delivering a course that meets real business goals.

Let me give you an example. I once talked to a performance consultant in charge of rolling out a leadership training course. The organization wanted all of its frontline managers to complete the course—and was prepared to gauge success on course completion rates. But completing a

course wasn't a true measure of success. They needed more than a report that stated who completed the training.

This particular organization was losing employees due to poor manager-employee relationships—and the course needed to help remedy that situation. So, I helped the consultant craft a training program designed to help managers relate in positive ways with their staff. The measure of success for the organization was meeting the goal of improved relationships. The e-learning course was just a means to meet that goal.

One way to make sure that your course has a real impact is to make it as practical as possible. If the goal of the course is to boost sales, then make sure learners get the practice they need to close more sales. Instead of focusing the course on information delivery, make it performance-based. You can do this by including real-world interactions in your course. When you provide training that mimics real-world interactions, learners can demonstrate proficiency in the skills they need to increase sales. And you can easily show the effectiveness of your course.



## Understand Customer Needs

It's easy to talk about meeting the organization's needs on a conceptual level, but what does that mean on a practical level as you build your course? Who represents the organization? Who is your actual customer? Your customers are the people paying you to design the course. If you work for an organization and your department is internal, then your customers are the other people in the organization. These can range from your manager to other department heads. If you work for an e-learning development company, your paying customers are a bit more clear.

So, how do set yourself up for success with your customers? First, it's helpful to understand the difference between perception and practice. You might think your level of customer service is excellent. And that might be true. However, what your customer thinks is what counts. Regardless of how good your service is, if the customer doesn't think it's good, then it's not.

To be successful, you need to manage your customers' expectations, and thereby their perceptions. The easiest way to do this is to follow the old rule: "Under promise and over deliver."



## Start with a Generic Plan

Here's a strategy that's always worked for me. Create a generic project plan that lays out all the possible tasks needed to build the course—from initial meeting to course implementation to course evaluation. It's key that you list all the possible tasks.

Once you have your tasks listed, create a timeline. You might want to start with a project timeline of 90 days. This gives you a good starting point. Based on the project needs, you can add or remove time.

Having this generic project plan to start helps when negotiating with your customer. If they want the project to move faster, ask them which tasks they'd like to remove. This lets you negotiate realistic expectations. The key point is that the project plan lets you show what's required to build a course and gives you room to negotiate a timeline that's realistic.

You can give yourself a cushion by using a rapid e-learning authoring tool. For example, you won't need to build the interface or navigation. But your customer doesn't need to know that. They don't care if you hand code the user interface or use a template; they care that the results meet their needs. So, keep those steps in your project plan to give you some extra room, then strive to finish the project ahead of schedule. Customers are ecstatic when you finish a project before they expect it.

## Be an E-Learning Concierge

There's a lot that has to happen to build an e-learning course and distribute it online. But your customer won't typically know much about instructional design or e-learning technology. They just want a training course that delivers results.

I suggest taking initiative to steer the course to completion—and providing one-stop service to your customer. If some of it's out of your control, then map out the process so your customer can manage the process with confidence. By becoming an e-learning concierge, you take care of the details that might otherwise cause your customer frustration. And no matter how good your course, if your customer is frustrated by the process, they may not perceive the project as a success.

The key point is that what your customer perceives is just as important as what's true. You can do a great job, but if your customer doesn't see it that way, your hard work is wasted. I've taken simple PowerPoint slides and converted them into basic click-and-read e-learning and the customer raved about it to my director and I got a bonus. On the flip side, I've built training I'd consider some of my best work, but the customer was lukewarm about it. This customer did nothing to acknowledge my work, even though he got a much better product. It's all about perception and how you manage the relationship and expectations.



## Establish Clear Learning Objectives Tied to Business Needs

Earlier, I talked about how important it is to build e-learning that's aligned with the organization's real business needs. But what happens if your customer comes to you with a training request that's not aligned? Put on your performance consultant hat and help the customer build an e-learning course that works.

That doesn't mean you badger your clients or try to make them comply with your insights and ideas. Instead, you can ask the right types of questions to help your customer establish clear learning objectives. If you play the performance consultant, typically one of three things will happen.

## 1. Your Customer Cancels the Project

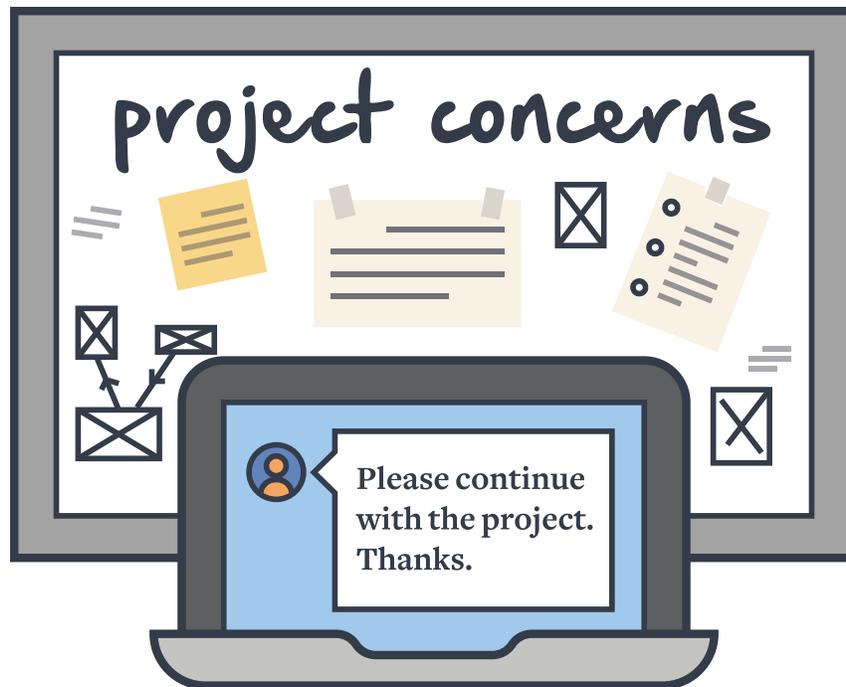
Many projects don't really align to the organization's needs. Often there's a business need and someone decides to throw a training course at it. But once you analyze the business need, you may find that training isn't the right solution.

If that's the case, you're wasting time and money to build a course. It's actually better if your customer cancels a project that won't really meet her needs. And by being the person who helps her understand that, you've established your expertise and value to the organization.

Make sure you report how you saved money by not building unnecessary training. That's just as important as creating successful e-learning.

## 2. Your Customer Gets a Better Project

By asking the right questions and mapping performance goals to training objectives, you'll build a better course. I've had a number of projects change direction (for the better) because I helped the customer reassess training goals and get more clarity around performance expectations. Your customers will get a better product—one that's linked to real performance goals.



### 3. Your Customer Sticks to His Guns

Sometimes, it doesn't matter what I think or what expertise I offer. The customer decides to proceed with the project despite my concerns. When this happens, my first impulse is to send a quick email detailing why the project is doomed to failure. Instinctively, I want the whole organization to know that it's about to waste time and money. But I don't do that. Instead, I remember that the customer pays the bills. In the end, it's my job to give them the best e-learning course I can within the parameters I'm given. My personal philosophy is to go with what the customer wants because there are many unemployed idealists.

## Understanding Learners' Needs

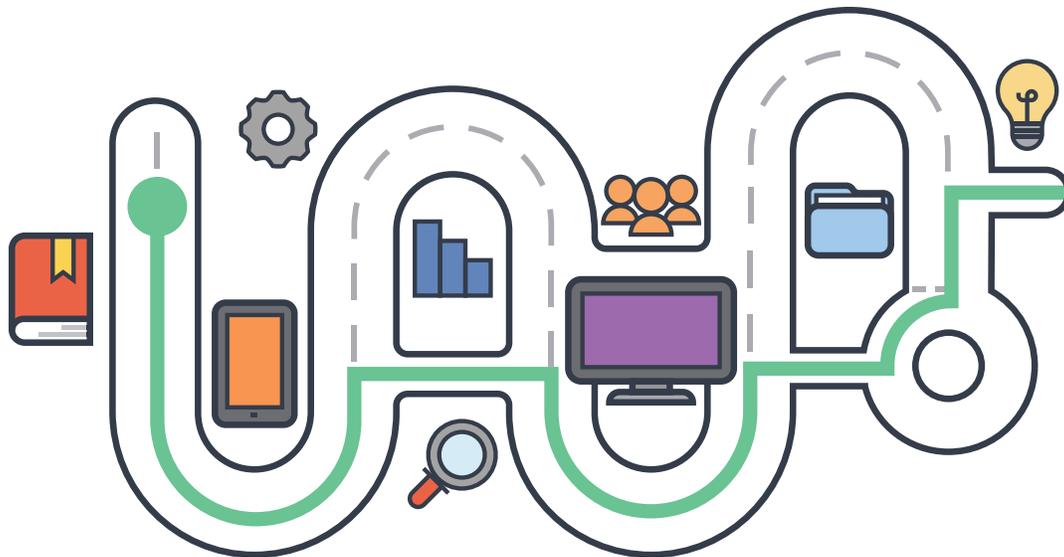
Now that we've talked about meeting the needs of your organization (and customer), let's look at another key stakeholder in any e-learning project: the learner. A successful e-learning course will be relevant to learners. No matter how much interactivity or rich media is in your course, if it's not meaningful to learners, it'll have little impact.

There are a lot of things you can do to make the course meaningful. It starts with being relevant. Another element is practicality. Here are some tips and tricks to help you get started.

### 1. Meet with Your Learners

Determine who will be taking the courses. Set some time to meet with them. Find out how they do their work. I've found that a lot of times the organization's managers may know what they want to do, but often they don't fully understand how the people they're training actually do things. That's why it's important to get close to the learners.

If you can't spend time with them to see how they do their jobs, try to at least build some focus groups where you can discuss what you want to do and get their perspectives. This also helps them feel they're part of the process, so when the training is delivered they don't feel like someone else created it without their input. You can also create surveys and do other things to solicit feedback and understand their learning needs.



## 2. Teach the Essentials

Remember that your learners are busy. They want just the information they need to do their jobs, or meet specific goals. Don't make them climb through mountains of information to learn what they really need to know.

I'll illustrate this point with a story. A few years ago, I set out to install crown molding in my living room. After cutting the molding, I realized that the angle was off because crown molding has a compound angle. I'm a smart guy, so I "guesstimated" the proper angle and made another cut. It didn't fit.

My next stop: Google. The first site I found was essentially Crown Molding University. It had everything you could possibly know about crown molding. I had to dig deep to find instructions on how to actually

cut crown molding. And then it might as well have been written in hieroglyphics. The mathematical formulas made my eyes glaze over.

Finally, I found a site where someone outlined a three-step process for cutting crown molding: line it up on the saw, flip it over, then cut. That's it. In three simple lines, this person accomplished what Crown Molding University failed to do with pages of mind-numbing complexity.

You want to create three-step e-learning, not Crown Molding University e-learning. No one's going to remember voluminous information anyway. Just give learners essential information, then show them where they can find additional resources if they need them. These can be job aids, manuals, or access to online sites.

### **3. Loosen the Reins on Navigation**

Say you're required to take an annual safety refresher course. You already know the information, and your only goal is to take the course by the end of the year. Now, imagine that the course designer locked down every screen and hired the world's slowest narrator. Instead of clicking to the end and taking the quiz, you have to spend two hours in "Next" button hell.

I can guess what you're thinking: "I have to lock navigation on my courses or learners will click right through and I won't know if they got all of the information."

But that's not necessarily true. In fact, if the course is relevant to learners, they'll be engaged and won't just click through. If they do click through, that speaks volumes about the content and how relevant it is.

Perhaps you're thinking: "That's all good, but to meet regulations, I have to lock navigation. The government requires that the course be two hours long."

I routinely hear that this or that is required by law. But in the 20 years I've been doing e-learning, I've yet to see a law so detailed that it tells you how to design courses. Of course, there are legal requirements you might need to meet, but they're often misunderstood and misapplied to course design.

Don't sacrifice your learner's time without doing your homework. You don't want to pull someone away from her job to take a course irrelevant to her daily responsibilities or that gives her information she already has. So, instead of committing to a specific design path—such as locked navigation—because someone says, "It's the law," ask your legal department for the true legal parameters. I worked with one group that did this, and guess what? The legal department told them they could offer a test-out option rather than forcing everyone to take the entire course. The result: 30 percent of learners did test out, yielding big time savings. I bet those learners were relieved not to go through the entire course, too.

Here are a few better ways to build courses that don't lock down learners.

**Let learners test out of the course.** If they can prove they already know the content, let them move on. You'll still have a record of completion, and they will have demonstrated the specified level of competency. If they can't test out, then they take the course.

**Let learners go to the final assessment first.** If they can't answer a question correctly, point them to the place in the course where they can get the information. That way, they only view information that's relevant and meaningful to their current understanding.

**Try integrating the quiz into the content.** Present information, then ask a question. Instead of taking a final test at the end, learners can go through the course and assessment at the same time. This could be in the form of a quiz or perhaps an interactive scenario where they make real-world decisions.

**Take a scenario-based approach and lock navigation at the decision point of the scenario.** Instead of pushing content in 10 slides that learners must click through, create a single, realistic scenario that tests a learner's skills or knowledge. Give them free rein to explore the scenario environment and pull the information they need to make the right decisions in the scenario. Lock the navigation so that learners

have to successfully complete the scenario (and thus demonstrate their knowledge or skills) before proceeding to the next part of the course.

## 1. Get Rid of Stupid Quizzes

Quizzes are great to assess a learner's understanding and provide more specific feedback. But make sure you build smart quizzes. And what are smart quizzes? Smart quizzes are quizzes that serve a real purpose. If you're presenting complex information and want to make sure learners are understanding it, then creating a knowledge check makes sense. It's a smart quiz.

But it's a waste of time to build a quiz where the correct answer is obvious and the other answers are nonsense. It's also pointless to build quizzes that try to trick learners or have questions so difficult you need a lawyer to decode them.

You also want to pay attention to how quizzes impact the flow of your course. It's pretty tedious when the flow of the course is: three screens, quiz, three screens, quiz, three screens...you get the idea. Have pity on your learners and ask yourself whether your quiz is overkill. Better yet, consider building a decision-making activity rather than a quiz question to test learner understanding. Your learners will stay more engaged, and you'll be able to prove that they can apply the information in real-world situations.



## 2. Use Interactions Wisely

Learners love interactions, right? Yes and no. They love interactions that are meaningful, but sometimes interactivity is a novelty that wears off quickly or is overkill.

A few years ago, I built a new training course with branched interactions rather than linear click-and-read navigation. When I showed the course to one manager, he told me he hated branched interactions. He told me that he didn't want his people following rabbit trails to figure out how to navigate the course. "Give it to us simple and let us get it done," he told me.

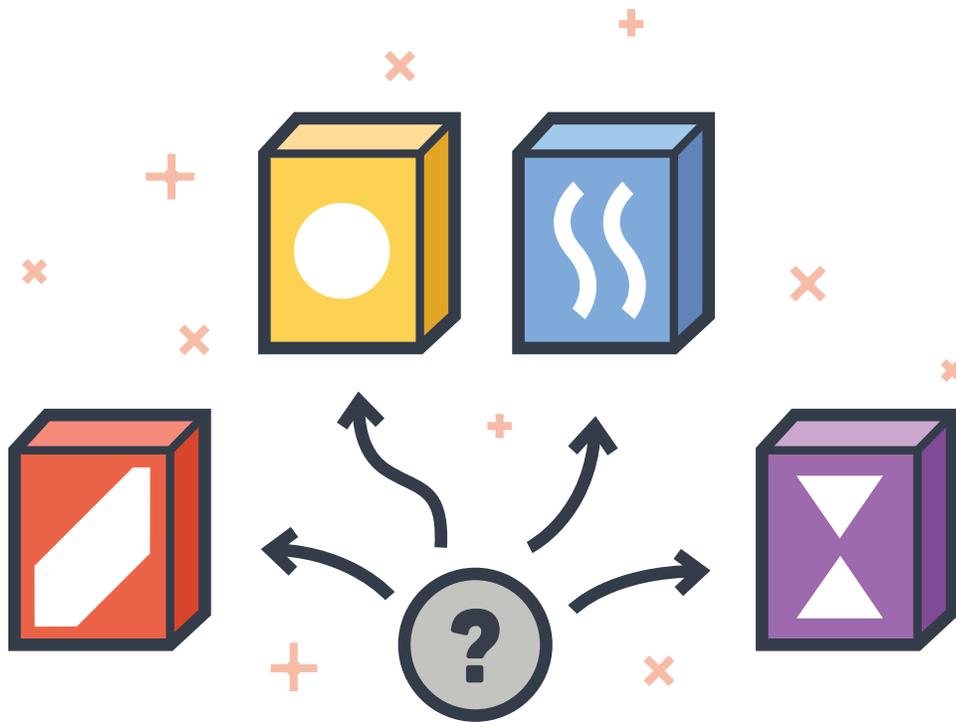
I can see his point. If you can tell people in one sentence to call 911 to report an emergency, you don't need to build a 20-minute activity-based scenario that teaches them the same thing.

In the manager's case, he wanted simple courses that let his people get in and out of them, and then back to work. This makes sense for compliance training with no real performance expectations. While click-and-read courses aren't super engaging, learners may actually prefer them in some cases. You may sacrifice some interactivity, but in the long run you do a better job of meeting your goals.

On the other hand, a performance-based course that mimics real-world decisions is a great place for interactive content. In that situation, a click-and-read course may not be sufficient and probably won't meet your training objectives. The bottom line is that you want to keep your learner's perspective in mind when you decide how to design your course.

Those are some basic tips to help you get started. Remember, you're the bridge between the customer who wants to create a course and the learner who has to take it. Be sure to get insight from both groups so that you build courses that are meaningful and effective.

# Choosing the Right Technology



You're ready to dig into your project, but which rapid authoring tool should you use? There are many on the market, so you have plenty of options. I won't deconstruct them all, but I can give you pointers on how to choose what's right for you.

But first, it's time for disclosure. I'm employed by Articulate, a company that makes rapid e-learning authoring tools. Yes, I'm biased. But after 20 years of developing e-learning courses, I wouldn't have joined the Articulate team if I didn't believe that Articulate's software is the best out there. So, I wouldn't say that my employment causes my bias. It's more accurate to say that my bias caused my employment.

Now that we have that out of the way, let's talk about the e-learning tools you can use to create your courses.

Regardless of the product, most e-learning tools fall into one of two buckets: form-based or freeform authoring. Let's do a review of each type of tool.

## What is Form-Based Authoring?

There's a lot that goes into building a good course. If you started with a blank screen, you'd have to make a lot of decisions. For example, you have to design the interface, the layouts, and the colors. There are also some programming considerations such as how to navigate the content and interactivity. All those decisions require some level of expertise

such as programming and visual design. Without those skills or access to them, you'd be stuck.

That's where form-based authoring saves the day. In a form-based tool, everything's pre-determined and the software does everything.

For example, with [Articulate Engage](#)—a form-based application—you simply add text, photos, and even video to a form, then click publish. The result is a polished interaction—built in minutes with no programming required. I like to call Articulate Engage a rock-star tool because everyone will “ooh” and “aah” and treat you like a rock star when you show them what you can create. They'll never know how easy it was.

Think of the form as a gelatin mold. If your mold is shaped like a heart, your gelatin will be shaped like a heart. If you want something shaped like a flower, you'll need a gelatin mold shaped like a flower. The molds are designed to provide something specific.

In the same way, the forms in form-based authoring tools are designed to give you a very specific type of interaction. If you want more than what the form provides, you'll want to think about freeform authoring where you have more programming control.

## What is Freeform Authoring?

With freeform authoring, you can build whatever you want from a blank screen. Flash and the older authorware are perfect examples of freeform authoring. The sky's the limit.

Everything you create is designed from scratch. It's a blank canvas, so you can add what you want, where you want it, and determine how the learner interacts with the content. That gives you much more flexibility for custom solutions than the form-based tools.

The tradeoff for freeform authoring is that to get more customizable options you have to know how to use the tools and program what you need. In the past, this was a big challenge when most courses were built in Adobe Flash. If you didn't know how to program (or have access to a programmer), you were stuck. Today, that's changed, because tools such as Articulate Storyline give you an easier authoring experience that doesn't require advanced programming skills, but still offers freedom of freeform authoring.

To summarize, forms are great for quick development, but they do have some constraints. Freeform doesn't have the constraints but does require a bit more production because you have more things to consider and have to know how to use the tools.

Most e-learning done today is usually a combination of form-based and freeform authoring. The question is when to choose one type of tool over the other.

## When to Choose Form-Based Authoring

With form-based authoring tools, you simply add your own content to a form provided by the software. Then the software does the rest—and when you publish you'll have nice-looking output.

If you're just getting started with e-learning, form-based tools may be your best option. They're incredibly easy to use, they're somewhat flexible, and, most importantly, you don't have to design everything from scratch to get a product that looks great.

Form-based tools are also great for non-programmers or subject matter experts who need easy and quick authoring. For example, at a previous place of employment we gave copies of Articulate Engage to some of our software developers. They liked to use the labeled graphics interaction to explain parts of the screen. All they needed to do was insert a screenshot and add labels. They were able to get their work done quickly and we didn't spend hours supporting them or building custom solutions that required frequent updates.

## When to Choose Freeform Authoring

Freeform's advantage is that you can build what you want, provided you know how to use the tools. As I noted above, this was a bigger concern years ago when most freeform authoring required some programming skills. But authoring software has evolved over time.

In the early 2000s, PowerPoint-based applications came onto the market. In fact, [Articulate Presenter](#) was one of the first to convert PowerPoint slides into an e-learning course. And now we have next-generation tools such as Articulate Storyline that offer a ton of capability with minimal programming required.

While many people deride PowerPoint because of their experience with bad presentations, the reality is that PowerPoint is an excellent multimedia application. It's a freeform tool where you can insert anything on the screen, and add animations, audio, and some interactivity. Once converted to Flash (or HTML5) you can't tell how it was authored.

There's a reason PowerPoint is so popular. It's easy to use and very capable. Couple it with Articulate Presenter and transitioning into the world of e-learning is a whole lot easier.

I like to think these tools democratized e-learning because they took the power out of the hands of a few programmers and put it into the hands

of anyone who wanted to build a course. It doesn't mean that the tools automatically create great e-learning. You still need some instructional design. But the tools do give you an opportunity that didn't exist before.

The question is whether to go with a PowerPoint-based product or a next-generation tool such as Articulate Storyline.



## Using a PowerPoint-Based Tool

PowerPoint-based authoring is great for those who are just getting into e-learning or have a lot of existing content already in PowerPoint. It's also a great solution for subject matter experts who do occasional course authoring.

With a PowerPoint-based tool, you can create rich e-learning content complete with graphics, audio, and video in a really familiar way. If you step away from the PowerPoint look, treat the screen like a blank canvas, and be intentional about the design, you'll soon be able to build courses in PowerPoint that mimic what you see in higher-end applications. PowerPoint-based authoring tools such as Articulate Presenter will then convert the content you create to Flash, HTML5, or iOS for iPad.

The downside to PowerPoint is that it's designed for linear presentations, so you're limited to basic click interactions and no quizzing. If you want a quiz or interaction it needs to be added to the PowerPoint slides. That's why Articulate Studio combines Articulate Presenter with [Articulate Quizmaker](#) and Articulate Engage. You can augment your PowerPoint content with assessments and interactions to create a complete and more robust multimedia learning experience.

### **My Plug for Articulate Quizmaker**

While there are many quizzing products on the market, I personally recommend Articulate Quizmaker. It works seamlessly with Articulate Presenter when you're using PowerPoint to build your e-learning courses.

Because it's form-based, the authoring is easy. Add your questions and answers to the quiz form, then hit publish. That's really easy to do, right? But what I like about Articulate Quizmaker is that you're not limited

to form-based authoring like you are with most quiz applications. Quizmaker also has freeform authoring. Switch from Form View to Slide View and you'll get a freeform, PowerPoint-like slide environment. In Slide View, you can customize the look and feel of your form-based quizzes, letting you create a much more dynamic course.

Quizmaker also makes it easy to create drag-and-drop interactions and branching navigation. It really is the most sophisticated rapid e-learning assessment product, giving you the best of both worlds: easy authoring plus the freedom to customize.

## Making Your Content Interactive

You can create a lot of interactive content in PowerPoint using hyperlinks and interactive branching. But if you want to build more complex interactivity, you'll find that PowerPoint has some constraints. Essentially, you're limited to click-and-reveal interactions. Also, adding branches and managing all of the interactivity in PowerPoint can be a challenge.

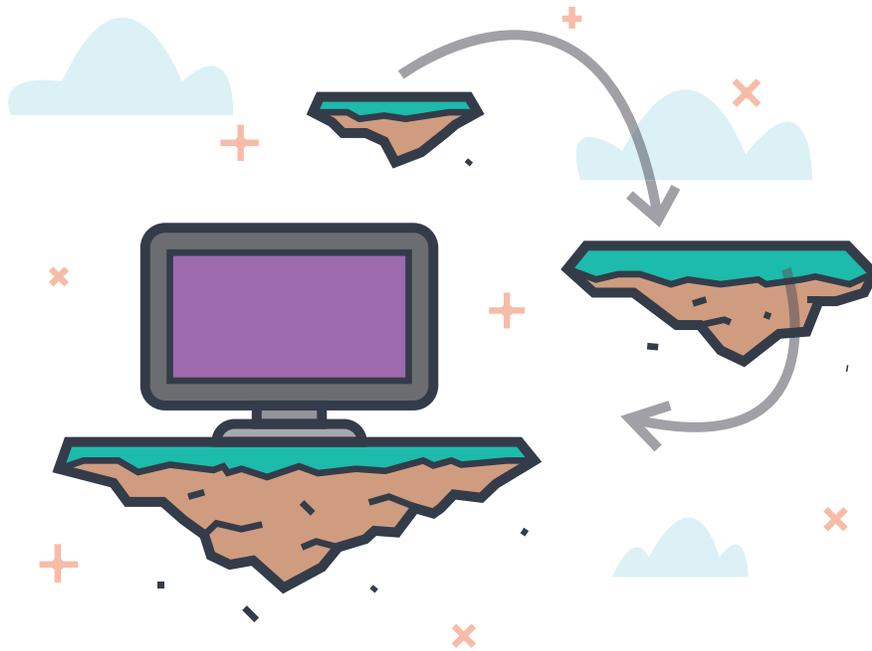
If you want more than click-and-reveal interactivity, I'd recommend Articulate Storyline. It's easy to learn, intuitive, and offers a lot more capability than PowerPoint-based authoring.

If you do stick with PowerPoint, then you can augment the slides with interactive content. Articulate Studio comes with Engage interactions.

You can also insert custom interactions to slides using the insert Flash or web objects features.

One caveat about adding custom interactions: There are a lot of things you can add to your slide to make the course interactive. The one thing you want to avoid is a final course that looks as if it's been cobbled together from several pieces of software. I call that a Frankencourse—and it's not good.

The best way to avoid a Frankencourse with PowerPoint-based tools is to choose a suite that includes all the functionality you need; you want to be able to author content, build quizzes, and create interactive activities in a seamless way. The Articulate Studio suite does just that. You create your content with Articulate Presenter in PowerPoint, then add assessments with Articulate Quizmaker and interactions with Articulate Engage. The result: a cohesive course with rich interactivity and assessments.



## Using a Next-Generation Authoring Tool

Traditionally, rapid authoring tools have been rooted in PowerPoint, giving you all the benefits described above. But such tools limit interactivity and customization to a certain degree. There's a lot you can do with PowerPoint, but eventually you run into constraints such as interactivity and programming control. The other applications in the suite help, but you're forced to use three different applications to get what you want.

In the past, the tools that gave you more flexibility and power have required programming skills. So you were kind of stuck with PowerPoint or needed to learn how to program in Flash.

But that's no longer the case. The next-generation authoring tools are getting easier to use. They offer more capability with less programming demand.

Articulate Storyline is a great example of a next-generation authoring tool. It moves past the constraints of PowerPoint yet it provides an authoring environment that has a similar comfort. While it's mostly freeform, which means you can do what you want, it does combine some form-based elements that simplify and speed up production. It's both simple and powerful.

When you use an application like Articulate Storyline, it really opens up the world of e-learning—much more so than what you can do with a PowerPoint-based application.

As I mentioned above, PowerPoint interactivity is limited to click-and-reveal. And this is accomplished by adding hyperlinks to other slides. Sure, you can build branched interactions and scenarios using the hyperlinks, but after a few slides it starts to get really clunky and harder to manage.

Here's an example. Before Articulate Storyline was released, I built an interactive scenario where a manager had to confront an employee and provide feedback through a series of choices.

To make it happen in PowerPoint, I built the initial decision-making slide and then three additional slides to accommodate the three possible choices. Each choice was a hyperlink to the appropriate feedback slide. Each feedback slide followed up with another decision-making interaction. This meant that I had to add additional slides to account for the decisions and subsequent feedback.

You can see how building an interactive scenario in PowerPoint quickly becomes onerous and unwieldy. Each decision produces a new slide, and the number of slides grows exponentially. As you can imagine, this can become a real mess.

In contrast, I can build this same decision-making interaction on a single slide in Articulate Storyline, using layers for feedback. If I want to repeat the process, I only have to duplicate a single slide.

This is a good example of when to use a next-generation tool like Articulate Storyline rather than a PowerPoint-based tool. If you want to build interactive content, Articulate Storyline is a no-brainer. It's going to be a lot easier to build, manage, and update. You'll save hundreds of hours in development.

While you can create compelling courses in PowerPoint, interactivity is where the PowerPoint-based tools break down. When it comes to interactivity, you have four things you can do on-screen:



- **Click:** user clicks an object or button to navigate or reveal content
- **Mouse over:** user hovers the cursor over an object to reveal additional content
- **Drag:** objects on the screen can be dragged from one place to another
- **Variables (such as text entry):** users' on-screen activity is collected and used to trigger other events

PowerPoint-based authoring is limited to click interactions. You can't do the mouse over or dragging. And you definitely don't have the programming controls to use variables.

Choosing the right tool really comes down to this: What's the best solution to meet your objectives at the lowest cost and at the speed of business?

Form-based authoring is attractive because all you need is content and the software does the rest. It's great for subject matter experts or quick projects.

PowerPoint-based tools leverage a tool you're already familiar with and a lot of your existing content. It's another great product for subject matter experts or presentation-type courses.

Next-generation tools such as Articulate Storyline offer the best authoring experience. They blend easy authoring with powerful capabilities.

Having created courses for about 20 years, I'd choose a next-generation tool like Articulate Storyline. The other solutions are fine, but there's a point where you hit a ceiling. Articulate Storyline has a slightly higher learning curve, but in the long run you'll get more value out of that tool.

I'd be remiss not to add that reputation and support are important considerations as well. You want to choose a company that offers outstanding customer service so you're not left hanging in the middle of a project. And if the company has an active user community like [E-Learning Heroes](#), you'll have an easier time getting advice, tips, and free content for that tool.

# Building Effective E-Learning



Effective e-learning meets real objectives. You don't need lots of bells and whistles if you build a course that's both relevant to learners and meets your customer's objectives. I've seen some really terrific simple courses with few bells and whistles that were effective; and I've also seen really slick courses that actually miss the mark because they're not relevant. You can find a lot of good information on learning styles, interactivity, and making courses fun and engaging, but this is the bottom line: The more relevant your course is to learners, the more engaged they'll be, even if the course isn't super snazzy. It's all about knowing what course type, graphics, and interactions will best serve your learners.

The types of courses you create can vary dramatically. You might create some to change workforce performance and others to simply share ideas or information. The first type of course is often tied to specific performance goals; the second is designed to improve awareness or impart new information. But both are typical e-learning.

To get started, I like to break courses into two types: information-based and performance-based. Knowing the difference will help you design a course best-suited to your course objectives.

## Information-Based Courses

Not all courses are created to change performance or behaviors. Many of them are more like public service announcements that build awareness. For example, your organization asks for an e-learning course that teaches employees about a new bonus program. That's an information-based course. It's designed to introduce the program and increase awareness. Following that module may be additional focus on how to apply the bonus or coach employees through the program. Those are focused on specific tasks. But the initial course isn't.

Many annual compliance courses are also information-based. In most cases, the learners already know the content, but they have to be certified each year. The focus isn't on changing behavior or performance, but on awareness and certifying a certain level of understanding.

These types of courses cover important information, but it's information that's not really relevant to learners in their daily jobs. It doesn't impact their performance goals at all.

Making information-based courses like these relevant to your learners can be tricky. Our tendency is to collect a lot of content, spread it over a series of screens, and then force everyone through it. Information is important, but it's more meaningful if it's presented to the learner in a context that is relevant.

I recommend drilling down to understand why the learner needs the information and how it might impact them. That'll help you identify what's relevant and meaningful. When I build these types of courses, I always try to be an advocate for the learner. I ask, "In what setting is this information important? How can I share the information without wasting the learner's time?"

After you've identified a meaningful context, strip everything unnecessary away and your learners will thank you for it. Also, if it's an information-based course, you can probably get away with a simpler course design. There's no need to build time-consuming interactions for a course where the only goal is that it's completed by the end of the year.

## Performance-Based Courses

If your course is supposed to change a learner's behavior—such as making better decisions on the job—then a performance-based course is your best bet. When you build a performance-based course, I recommend that you mimic real life, giving learners scenario-based decision-making opportunities that let them practice what they'll need to do on the job.

Many courses take a bullet-point approach with a series of click-and-read slides and finish with a 10-question quiz. Those types of courses are easy to build. But they don't do a good job of connecting the learner in a real way to the content.

What I like to do is mimic the performance environment as much as possible. Put the learner in a real-world situation and have them learn as they go. You can do this by creating interactive scenarios where the learner has to make decisions. Instead of just consuming information, the learner is now practicing in the context of real-world situations. Better yet, they can pull information at the point of need: when they are making decisions. Chances are, the learners will make some correct decisions and some incorrect decisions, just like in real life. And you can provide highly relevant feedback as they make decisions, offering explanations or additional challenges.

Here's how this would work in practice. Let's say you're building a course to improve the way employees communicate with coworkers on projects. You could set up a scenario with two people, as they dialogue back and forth. During the conversation, the learner picks up on cues and perhaps has other opportunities to collect information. Perhaps she receives an email, looks through a project folder, or has someone else present a project status update. There are all sorts of ways to introduce new content that would normally be bullet-point slides. Somewhere during the process, the learner makes decisions based on the situation and available information. Those decisions have consequences that allow you to provide relevant feedback. With this approach, the learner learns by getting in-context feedback that mirrors how they'd function in the real work environment.

KEYSKILLS

Unfinished Job

**SHARE YOUR OBSERVATIONS**

Think about how you'll share your observations.

Review the statements and select the one you feel best sets the tone.

**FEEDBACK**

Right on! You did a great job sticking with the observable facts, and you didn't bring in your own conclusions or hearsay.

Now let's move on to the next step: ask a question.

Thursday you said you'd be able to submit the report early. But you didn't and you never gave me a heads-up.

You didn't submit the report & you left early on Friday. I'm concerned that maybe you forgot about the report or didn't feel it was important.

I'm so disappointed. Your laziness is really giving our department a bad reputation.

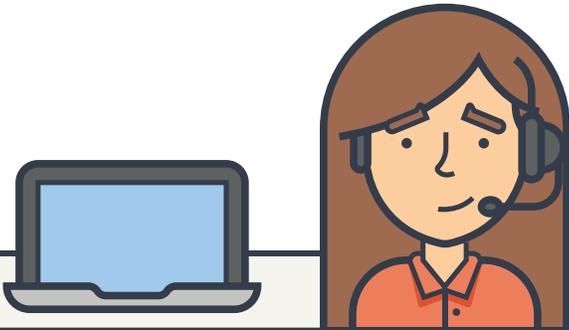
CONTINUE



Wouldn't you rather learn this way than simply sitting through an information dump? Of course, this type of course will take more time to build than a linear presentation, but it's much more relevant to the learner. Odds are that by making information more engaging and memorable, you'll be better able to meet your course goals.

I also like to break performance-based courses into two additional buckets: procedural and decision-making.

Procedural courses are linked to very specific actionable steps. The steps walk through a sequence of events such as "10 steps to changing a tire" or "five steps to adding information to Salesforce." It's very easy to assess learner understanding for these courses. They either know the proper sequence or procedures, or they don't. They're also easier to build.

Comstar: Call Handling Procedure					
step 1	step 2	step 3	<b>Step 3: Restate the Issue</b> Restate the customer issue to confirm the reason for the customer's call. For example:  <i>"To confirm, you are calling because you have not yet received your Comstar Bill?"</i>	step 4	step 5
					step 6

The other type of performance-based course requires the learner to make decisions. What drives the decision is a set of guiding principles rather than knowledge of a certain sequence of events. In this type of course, it's often not about right and wrong as much as it is about applying the principles. Each interaction is dynamic, helping the learner understand the consequences of each choice they make. The end result is that they'll learn how to follow principles to get the outcome they want.

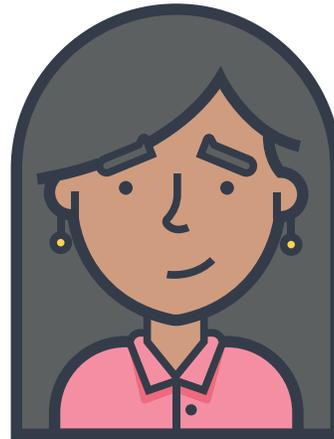
**Welcome ! I'm Erica Jones, the hiring manager. Thanks for coming today.**

**Why don't you tell me a bit about yourself?**

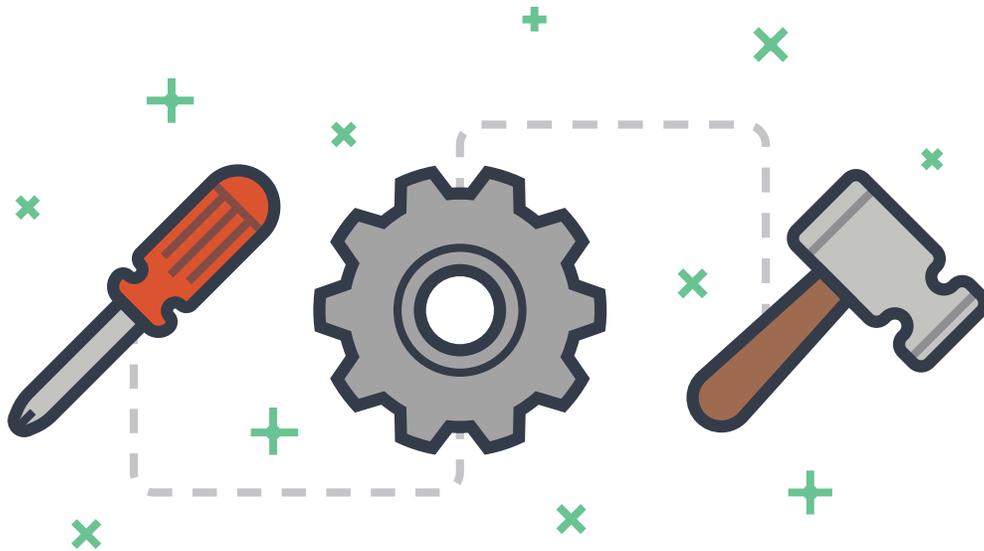
My career started years ago when I graduated from university and immediately started working for a technical writing company where ...

I'm an award-winning instructional designer with a focus on technical writing and a passion for visual design.

Hmmm... that's such a broad question. What do you want to know?



So, why have I spent all this time describing the different types of courses? Because it will help you allocate limited resources and get the most bang for your buck (and time). If you need an annual refresher course that simply certifies that learners have completed it, then perhaps a simple, relatively inexpensive linear course will suffice. You'll have money and time left for those courses that really do require more interactivity and production resources. However, if you spend all of your time overbuilding what could be a simple course, you might not have adequate resources available to you when it comes time to build more complex training.



## Understanding Essential Course Elements

Now, let's dive into course development. There are three essential elements to every course: content, visual design, and application.

### What Content Needs to Be in Your Course?

Most of the time, you'll source content from existing classroom materials and subject matter experts. The tendency is to include everything, but the trick is to only include the content that is most appropriate. Build your course around clear objectives. That helps determine what's important and what's not. The content that's not important to meeting the objectives can be included as job aids or online resources.

We're an information-hungry culture, but information by itself doesn't do anything. And building e-learning involves much more than simply exposing learners to information. To create effective e-learning, you must tie information to specific learning objectives that support the ultimate goal of your course.

First, you'll need to formulate a main learning objective, then you can drill down to the additional content you need to meet it. You can do this by answering three questions:

- What needs to be learned?
- Who needs to learn it?
- What do they need to know before they can start?

### **What Needs to Be Learned?**

Ask your client what they expect the learner to be able to DO with what they learn from the course. If your client tells you that the learner needs to “understand” something, you're in vague territory. Push them to detail what this understanding would mean. How would they know whether the learner has understood the information? Once you understand this, then build a measurement around that.

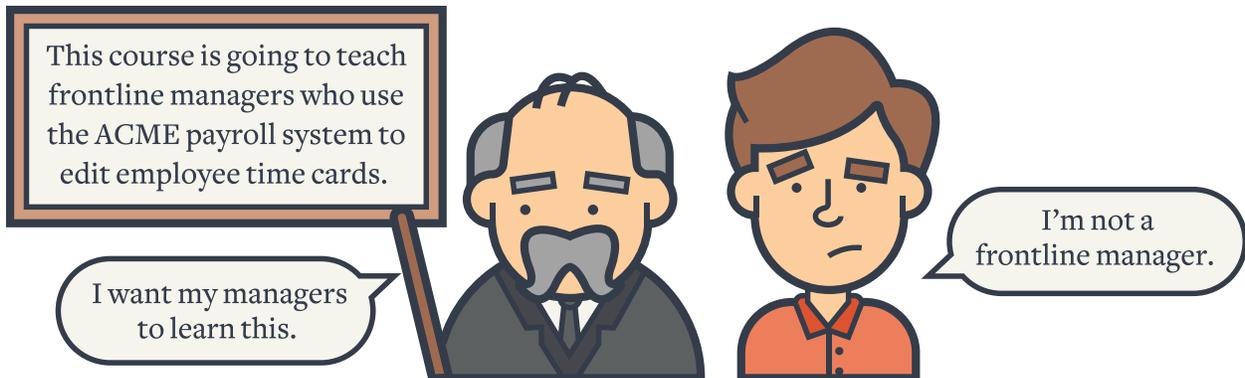


## Understand how to edit time cards.

What does this mean?  
What am I supposed to **DO**?

### Who Needs to Learn It?

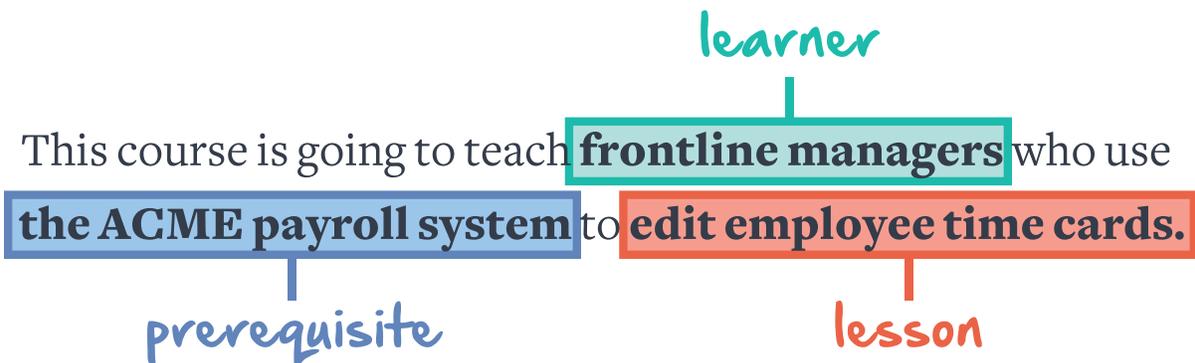
You need to be clear on who will take the course. By including this information in your objective, you can qualify potential learners. Are they new employees? Managers? You don't need to do a full analysis of the learner right now, but you do want to identify the audience for the course and what they'll be able to do after completing it.



## What Do Learners Need to Know Before They Start the Course?

All e-learning courses will require some prerequisite understanding or experience. By identifying what that is, you can either require it before learners start the course, or create additional content that gets learners to the prerequisite level. You can't reach your goal if you don't know the starting point. It's difficult to teach learners without knowing where they're at.

Once you've answered these questions, you can define your main objective. Look at the example below:



You know who is going to learn (frontline managers), what they'll learn (edit time cards), and what they need to know before they learn it (ACME payroll systems).

Now that you have your main objective, you can start defining additional learning objectives. In our example, if you want learners to be successful at editing time cards, they need to know how to use the ACME payroll system. So, you can create another objective that includes learning how to use the ACME payroll system. And that objective may have a prerequisite that the learner know how to collect time card data. Or perhaps they need to understand the company's time card policies.

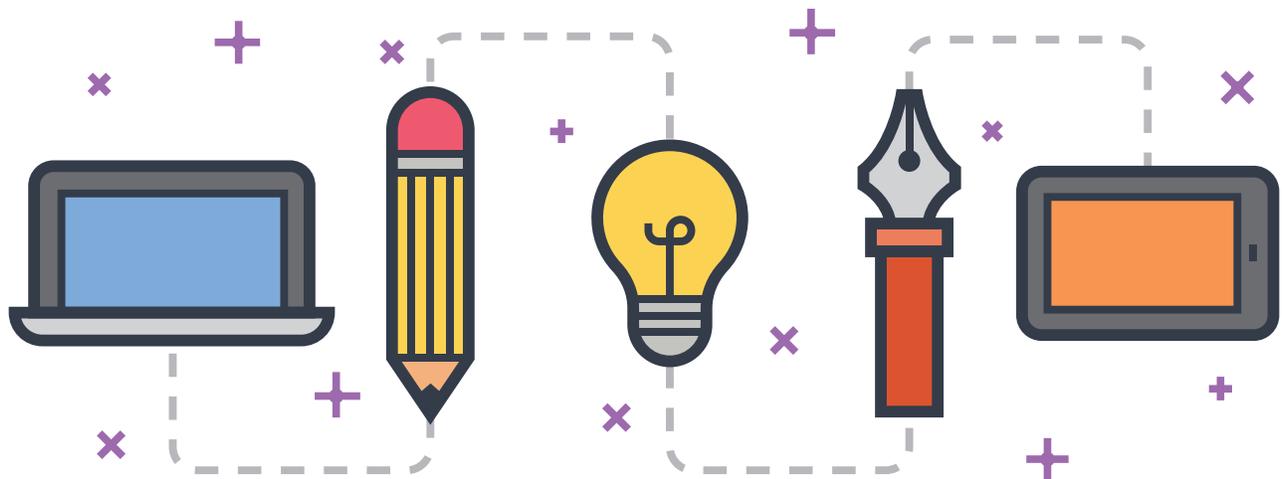
As you can see, as you follow the path from where learners are to where they need to be, the learning objectives become clear. The key is to keep drilling into what the learner needs to know before moving to the next point.

Once you've detailed all of these objectives, you'll have clear guidance on what content you'll need to collect—and how to sort it—in order to meet them. You'll also be able to communicate to your client exactly what the course will accomplish.

## **What Will the Course Look Like?**

From my experience, this is the area where courses can make the biggest improvements. E-learning is a mostly visual medium, so having a contextual look and feel is important. It conveys meaning about the course, sets expectations, and can provide the initial engagement. The course is going to look like something regardless of how much effort

you put into it. Your job is to make sure that how it looks fits with your content and subject matter.



## Setting the Look of Your Course

If you're building rapid e-learning, I'm betting you probably don't have access to a graphic designer. That means you'll have to do most, if not all, of the graphic design for your course. While this isn't a graphic design e-book, I can offer you a few tips to help you set the look of your course.

### 1. Use a background that creates a visual connection to your content.

Every slide has a background, and it's the largest design component of the screen. You'll want to choose a color, abstract design, or image that connects with your content.

**2. Choose colors people naturally associate with your content.** A course for small children might use bold primary colors. But one on fire safety might use red and white. Learners associate colors with certain topics and feelings, so you need to be intentional about which colors you choose.

**3. Use a maximum of two fonts in your course.** Typography isn't just for providing readable text; it's also a graphic element. The fonts you select for your course will send a message in the same way that colors do. Fonts can be playful, serious, modern, traditional.... You get the idea. I recommend choosing a maximum of two fonts that reinforce your design aesthetic. Use one font for titles and subheads and the other font for body text.

**4. Remember that shapes impact your aesthetic.** You'll likely use both shapes and lines as part of your course or background. Will you use blocks or circles? Will the lines you use be straight or more organic? Play around with what shapes convey the right feeling for your course.

**5. Select imagery that matches your course style.** Vector images and clip art give a very different feel than photographs. And photos may call for a different type of coloring and background. The key is to make sure that the imagery you choose matches well with your other design elements so that your course has a cohesive look.

**6. Don't forget user interface (UI) elements.** User interface elements are those things that guide a learner's actions or expectations on the screen. Buttons are a good example of a UI element. You'll want to think about what these UI elements will look like. Are they distinct so the learner will know that they're part of the interface? Do they fit in with other elements in your course? If you have a highly customized design look, then you may want to design your own buttons to match rather than using default buttons in your authoring software.

These tips are by no means all-inclusive design guidelines. But they will help you think about the look of your course. The key is to be intentional about your course design. Before you begin assembling a course, I recommend making a list of what needs to be on your screen so you can make appropriate decisions about what they will look like. That way, nothing will be there by accident and everything on-screen will support your overall design and objectives.

If you don't take this important step, then you may end up adding content to the screen that looks discordant and unprofessional. And if your course looks sloppy, your learners may think it's not important or worth their time—and you'll have an uphill battle keeping them engaged and motivated.

## How Will They Apply What They've Learned?

The course exists for a reason. Develop clear, actionable objectives, and then build activities and interactions in the course that allow the learner to practice applying what they're learning. During this practice you're able to provide the appropriate level of feedback.

### **Put the learning into action.**

Integrating interactivity into your courses is a great way to help learners connect with content. The best interactivity actually lets them practice what they've learned—and lets them learn by practicing.

You can think of interactivity in different ways. Interactivity can mean anything the learner does on the screen. But more importantly, interactivity involves getting the learner to interact with course content. You want to put them into action, so they're not passive consumers of the information.

Take a look at this [vacation website](#). It's designed to lure you into doing more on the screen, including contacting Royal Caribbean to plan your vacation. Royal Caribbean could have thrown up a website with a list of features and links to more information. But it wouldn't have been as effective. It's so much more engaging for you to pack a suitcase to show your travel interests, isn't it? Why can't your course be the same way?



Remember, learning is a complex process, and engagement is a key part of it. When learners interact with content—I call this “touching the screen”—they’ll likely enjoy the experience more and be more engaged.

However, when you think of interactivity, be careful not to think only of the user experience. I know that sounds weird, but let me explain. I’ve had clients tell me that they want an “interactive course” and what they really mean is that they want a certain user experience that includes rollovers, cool buttons, hotspots, and drag-and-drop activities. These are all useful interactive elements that offer a great user experience. And you should take advantage of them.

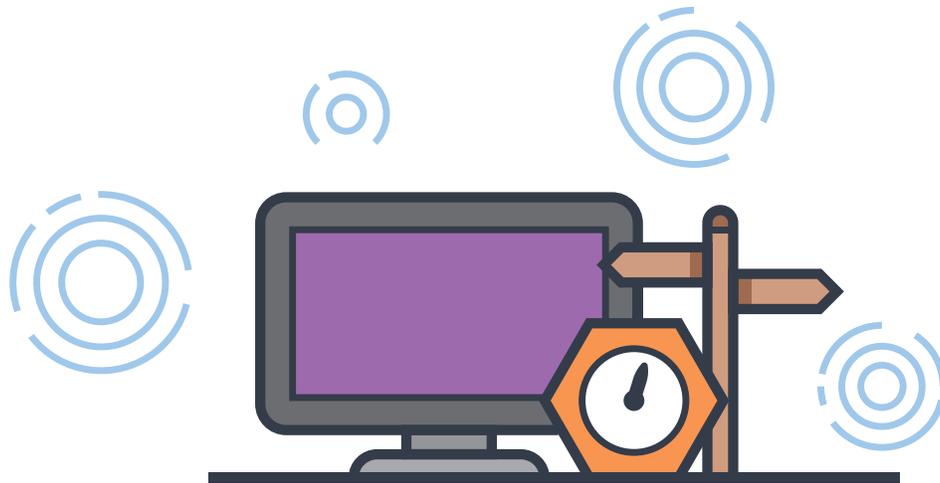
What you don’t want to do is let user experience trump instructional design. They should go hand in hand. If you treat interactive elements as

novelties, they won't actually improve learning. And they'll get old. Your learners will eventually get frustrated with rollovers and extra clicking if it's pointless. Instead, use on-screen interactivity as part of the learning experience.

### **Creating meaningful interactivity.**

Building great interactivity for your course starts with having relevant content. So, before you start mapping out interactive elements for your course, determine how you can frame the content so that it's relevant for the learner. If it's not relevant, you've already lost the learner—and no amount of on-screen activities will keep your learner engaged.

If you're looking for ideas, ask potential learners how they'd use the e-learning content in their work environment. You'll likely walk away with some great ideas for interactive scenarios and simulations. And if your course is an update of existing training, talk to learners who have taken the course to find out what worked and what didn't, and how the content might relate better to their world.

**Build interactivity that lets learners explore content.**

Most e-learning I've seen is fairly linear; learners move from one slide to the next in a sequential way. That's not bad on its own, but it does set you up to push information to the learner and makes it harder to incorporate relevant interactivity.

Instead of creating a linear path of information, look for ways to let the learner find information or access it in different ways. For example, you could present them with a decision-making opportunity, then let them look for content they need to make the decision. Or, let them make a decision, then provide content through the feedback or consequences of their decision.

When you let learners explore, you give them the power to determine what information is relevant. A large part of learning, in fact, is about forming a hypothesis and then testing it out. What happens if I do this?

Or how about if I make this adjustment? What happens if I make this choice and click here? I might be wrong—and often I am—but that’s okay. The process of reflecting on an idea and then testing it advances our understanding and learning.

### **Let learners pull content.**

The biggest thing you can do to transition from non-interactive to interactive e-learning is to build an environment where the learner has to *pull* information rather than simply consume content you *push* to them.

The easiest way to do this is to craft decision points. Force your learner to make a decision, and give them a way to collect the information they need to make that decision. Now, some people won’t collect the information. They’ll just make educated guesses. Sometimes they’ll be right, and sometimes they won’t. That’s okay. They’re fine getting feedback and making adjustments.

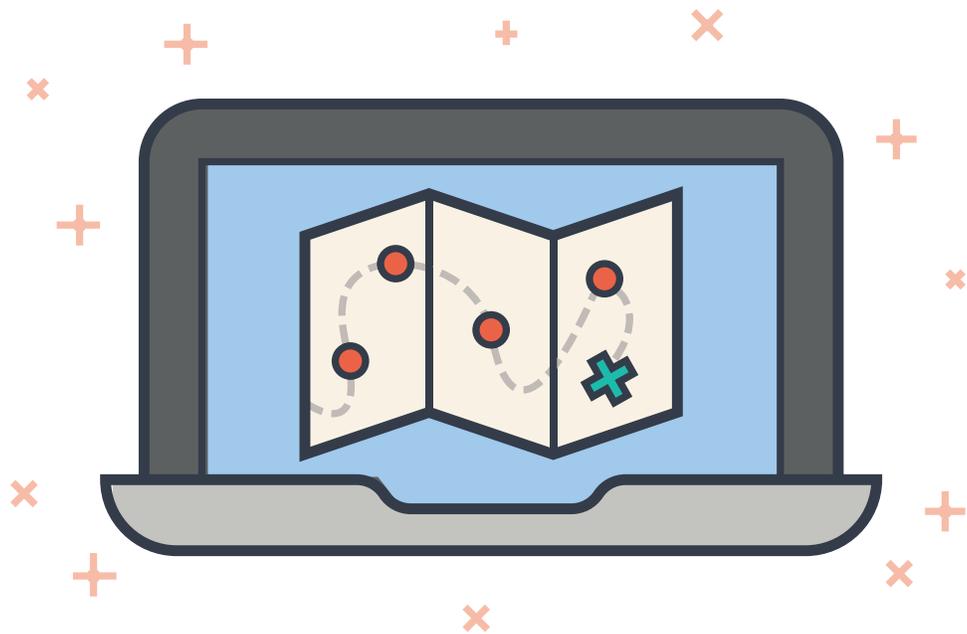
Others won’t make a decision until they’ve done an exhaustive search of every piece of information you make accessible to them. That’s okay, too. In both cases, you’re engaging the learner and giving them the freedom to learn in the way that works best for them.

When you use this approach, you can sprinkle content throughout the decision-making environment:

- **Add important information to the question itself.** For example, “Our company policy is to report all suspicious people immediately to security. What constitutes a suspicious person?”
- **Include information in the choice options.** For example, make each suspicious behavior a multiple-choice option. This way they can acquire some information analyzing the choices.
- **Give learners an opportunity to collect information.** For example, have a security person explain what constitutes suspicious behavior as the learner hovers the mouse over different characters. They’ll collect information as they move around the screen.
- **Add information to feedback.** For example, if the person only identifies one of five suspicious behaviors, the feedback could say something like, “That’s true, this is suspicious behavior. Other suspicious behavior includes....” This lets you cover what they missed.

You’re still giving the learner all the information they need to know, but you’re prompting them to think about the material in a more meaningful, engaged way. You’re placing them in scenarios that are relevant to their work and helping them put their knowledge into action by making realistic decisions. Plus, you’re giving them a much more engaging, interactive e-learning experience.

# Creating a Repeatabile Process



While every project will have its unique attributes, you can still create a repeatable process to guide your way. Let's take a look at how you can avoid reinventing the wheel for every project.

**Template your project plans.** All projects have the same basic steps, so there's no reason you can't use the same generic project plan for every project. By creating a reusable project-plan template, you'll have a ready roadmap to help you and your customer complete necessary steps. It's a great starting point for discussing timelines and resource requirements.

**Template your learning processes.** Create a structure that helps you get started with designing the learning process for your next project. In all cases, learners need information and they need to know how to use it. So, create a simple map that outlines the generic learning process, even if it's just a series of questions.

- What are the course's objectives?
- How will I know they've been met?
- What's the learner's perspective on this information?

**Template your production staff.** Create a list of roles required for your project, even if you'll likely fulfill the role yourself. It will help you think through what's needed and help you flesh out your project plan and show your customer what's required. Add more detail than less; you can always omit unnecessary items later. That's a lot less painful than forgetting a key step mid-project.

Here's a list of some of the roles you might need on your project:

- Project manager
- Subject matter expert
- Instructional designer
- Graphic designer
- Flash programmer
- Courseware developer
- Learning management system expert
- IT support

Note that some rapid e-learning software can handle a few of these roles (such as Flash programmer), so you may not need them.

# Measuring Success



Your organization's goal isn't to create more training. It's to meet performance objectives. E-learning is just a means to that end. Rapid e-learning pros understand this. They always keep an eye on how the training will impact the organization's bottom line.

First, always do a post-project report. If you can't show your organization or client that your course made a real impact on their bottom line, they'll probably start looking for a new e-learning designer. Or, they'll simply cut the training budget or your training group. Talk to training industry veterans and they'll tell you—when companies want to cut costs, they typically put training on the chopping block. So, ALWAYS do a post-project report, even if you're not asked to do one. You want to make sure that the organization knows the true value of your work.

Second, measure the right things. Here's a common way that training success is reported: "We had 5,000 frontline managers take the course."

Suppose you get 5,000 frontline managers to take a four-hour leadership training course designed to help reduce turnover. Does that demonstrate the course's overwhelming success? NO! Here's why:

If 5,000 people spend four hours taking the course, that's 20,000 hours those managers aren't doing their primary jobs. And let's say the personnel cost (salary, benefits, etc.) is \$50 per hour, per employee.

$$20,000 \text{ hours} \times \$50/\text{hour} = \$1,000,000$$

If you measure success by how many frontline managers complete the training, you'd better be prepared to show the organization how that million-dollar investment will pay off.

Instead, encourage the organization to collect performance metrics tied to the course goals. For example, if the course was designed to help improve employee retention rates, measure those rates before and after the course. Then you can report: “We’ve improved the employee retention rate by 25 percent by focusing training on retention-related issues and equipping managers to build positive relationships with their employees.”

Of course, this kind of data isn't always available. Then what? Use the data that you DO have. Most likely, you'll have some sort of assessment in your course. And if you've designed the course to mimic real-world scenarios, it's valid to suggest that the users will have similar success at work.

If you can't track the assessments of all the participants, then pull a handful of users and just track them. It's better than nothing. My view is that it's reasonable to assume that your sample group's rate of success will translate to the entire learner population. If someone in the organization doesn't like what you report and wants a more scientifically sound number, then by all means, encourage them to hire someone to do a detailed analysis.



Third, tie into your customer's success. When you build training that contributes to a business unit's success, you should include those metrics in your report. While you can't take full credit, it's completely valid to assert that your sales training helped boost sales revenue. So, if your customer reports improvements to their business unit, you should too.

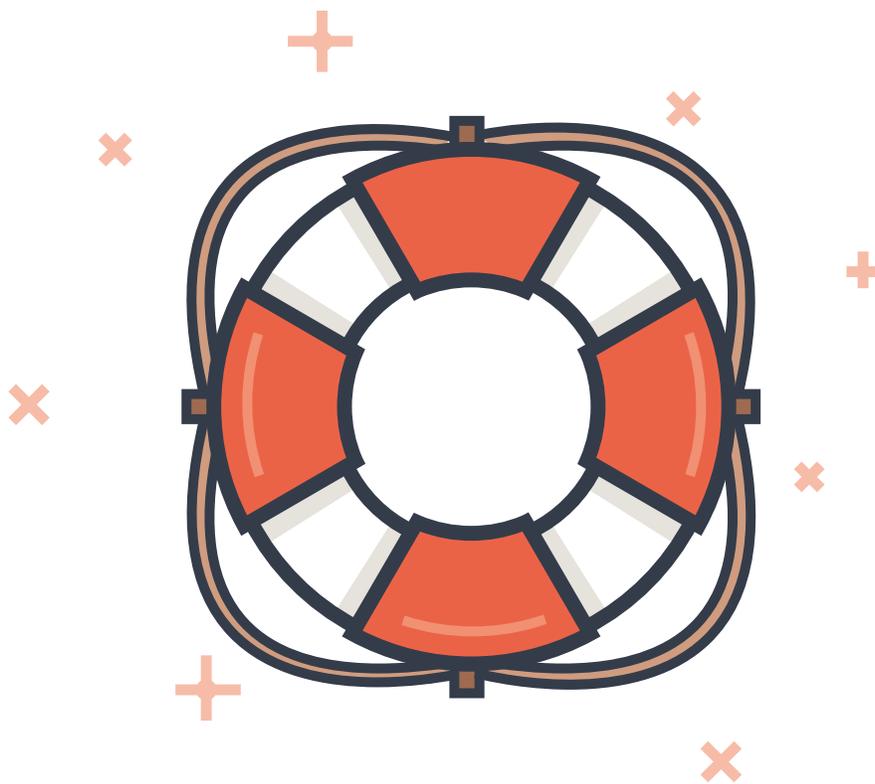
Finally, report the savings of rapid e-learning. Rapid e-learning authoring tools save time and money, letting you build online courses at lower costs. That in itself supports your organization's goals. You can always report that you delivered X number of courses at Y value. And if you delivered them ahead of schedule, be sure to note that, too.

You can even research how much it would cost to build a comparable course with a vendor. Then, in your report, compare that cost to the

cost of building your course. For a project I created a few years ago, an e-learning developer quoted \$18,000. I built the same course for about \$4,000. That's a great number to report. Plus, when your organization develops courses in-house, it owns all of the content and project files. So, if they need to make a change later, they won't have to go through the vendor again—an often costly and time-consuming process.

The key point to remember is that the e-learning you create needs to meet your organization's objectives. You can't go wrong by showing that you boost the bottom line by saving time, cutting costs, and helping to improve employee performance.

# Get Support



You've made it! I know, there's a lot to digest. Here's the good news: To be a rapid e-learning pro you don't need brilliant ideas, you just need to remember to keep learning objectives aligned with organizational objectives and to balance the needs of your customer with the needs of the learner. I guarantee that if you work hard and show your value to your organization, they'll recognize you as a rapid e-learning pro.

And here's even more good news: You don't need to go it alone. Take advantage of the E-Learning Heroes community. It's a great place to connect with your peers to find advice, get help, and share what you're thinking about. Odds are that you're like many e-learning developers, where you're either on a small team or a department of one. You can benefit from a community of thousands. You'll quickly find others doing the same day-to-day work and solving the same problems. The community offers shortcuts and best practices as well as free downloads, course examples, and other assets that'll save time and help you build better courses. In fact, I encourage you to visit [www.elearningheroes.com](http://www.elearningheroes.com) right now to download some free templates and other assets to get you started.

Go forward with confidence and zeal! Good luck!

If you enjoyed this guide, please feel free to link to it from your own site or [share this link](#) on social networks.

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