December 5, 2005

The eLearning Guild's
LEARNING SOLUTIONS SM
Practical Applications of Technology for Learning
e-Magazine

THIS WEEK: Design Techniques

The Design Document: Your Blueprint for e-Learning Standards and Consistency

By Monique Donahue

If you are just getting started in e-Learning – or even if you are a seasoned veteran – what tools are you using to plan and organize your approach to each course? Are you recording the design decisions your team makes along the way? What are you doing to ensure consistency of design across multiple courses or multiple developers? A well-written design document helps solve these problems by outlining the design specifications, standards, and conventions specific to your e-Learning development. The design document does just what its name implies – it formally documents the design decisions your team makes for a given project. It serves as an excellent reference tool and ensures that everyone on the team is speaking the same language and following the same rules, and it's a great way to bring new team members up to speed quickly. The design document also tells your clients, whether internal or external, exactly what features and functionality they can expect from the finished program.

What, then, goes into a design document? At the Educational Institute of the American Hotel & Lodging Association (EI), we consider the design doc-

In any project, it is normal to document the specifications and the scope of work. But in e-Learning projects, designers must spell out a number of other elements, including the course features that will be standard across lessons and modules, the design strategy for critical elements, and media standards. These must be communicated consistently to the rest of the team, and in many cases must be signed off on by the client. Read this week's article and learn how to put together a planning document that will help you identify and manage all the critical items!

A publication of

THE ELEARNING GUILD

ument a living document that continues to evolve as our team refines its processes through feedback and experience. In its current incarnation, the structure of our design document template comprises six major sections: Project Specifications, Standard Course Features, Design Strategy, Technical Specifications, Media Standards, and Project Management. This article will help you create your own practical design document by walking through each section in detail and reviewing the information and best practices our organization has found helpful. Although the decisions you make and the information you choose to document may differ from ours, this should serve as a good place to start.

Project specifications

Our first step in any e-Learning project is to outline its most fundamental requirements – those attributes that define what we are building and for whom. The methodological and technical aspects of how we will conceptualize, build, and maintain the program come later in the design document.

Overview

We begin by specifying the basic parameters of the project: a brief description of the course and its learning objectives, the intended audience, targeted length, and any prerequisites. If there are specific audience characteristics that should be taken into consideration, such as the level of computer and/or job experience, language or literacy barriers, or secondary audiences who may also participate in the training, those should be noted here. Also indicate the overall course length, as well as any standards for the maximum length of individual modules within the course. For example, we typically try to keep our modules to no more than 20-30 minutes in length to make it easier for users to complete the course in several short sessions.

Deliverables

We also define the exact materials or output that the team will submit for review and approval during various phases of course development. For EI, that most often includes:

- *Detailed course plan* – a comprehensive outline of course content and structure.
- *Draft storyboards* – a screen-by-screen breakdown of content, interactivities, media, and audio script.
- *Supporting resources* – often a course glossary or

The eLearning Guild's LEARNING SOLUTIONS e-Magazine
Practical Applications of Technology for Learning

Publisher David Holcombe

Editorial Director Heidi Fisk
Editor Bill Brandon
Copy Editor Charles Holcombe

Design Director Nancy Marland Wolinski

Learning Solutions e-Magazine™ is published weekly for members of ***The eLearning Guild***, 525 College Avenue, Suite 215, Santa Rosa, CA 95404. Phone: +1.707.566.8990. www.eLearningGuild.com

Important Announcement

THE eLEARNING DEVELOPERS' JOURNAL

Between January 2002 and August 2005, this publication was known as **The eLearning Developers' Journal™.** In September 2005, we changed the name of the publication to **Learning Solutions e-Magazine™** and completely redesigned the layout to make it more reader-friendly. Since its inception, this publication has focused on being a forum for members to share their strategies, techniques and best practices for designing, developing and managing e-Learning. While the editorial focus of the publication will not change, we believe this new name will more accurately reflect the true content and audience of the publication which is much more than just developers. We hope you like the new name and layout and we certainly hope you continue to find value in this important publication of ***The eLearning Guild***.

Learning Solutions e-Magazine™ is designed to serve as a catalyst for innovation and as a vehicle for the dissemination of new and practical strategies, techniques, and best practices for e-Learning design, development and management professionals. It is not intended to be THE definitive authority... rather, it is intended to be a medium through which e-Learning professionals can share their knowledge, expertise, and experience. As in any profession, there are many different ways to accomplish a specific objective. **Learning Solutions** will share many different perspectives and does not position any one as "the right way," but rather we position each article as "one of the right ways" for accomplishing an objective. We assume that readers will evaluate the merits of each article and use the ideas they contain in a manner appropriate for their specific situation.

The articles in **Learning Solutions** are all written by people who are actively engaged in this profession – not by journalists or freelance writers. Submissions are always welcome, as are suggestions for future topics. To learn more about how to submit articles and/or ideas, please visit our Web site at www.eLearningGuild.com.

external PDF files (worksheets, forms, job aids) that users can launch and print from within the course.
- *Assessments* – draft questions for quizzes, exams, and course evaluations.
- *Prototype module* – a sample module with media for clients to approve before proceeding with development of the full course.
- *Completed, fully enabled program* – the completed program for full testing.

Depending on your needs, you may choose to combine or eliminate some of the above deliverables, particularly if you are working in a rapid development or rapid prototyping environment.

Existing content resources

Finally, we document all existing and available resources we will derive the course content from. If we or our clients have subject matter experts, existing training or documentation, or other materials to be used as a source of content, it is listed here as a reference for all team members.

Standard course features

The next step is to establish a high-level course framework. The decisions made at this stage will ensure consistency of presentation across all modules within a course, or across all related courses that are part of the project.

Course components

Begin by deciding what elements will be included in your course. Some of the typical course components referenced in our design documents include:
- *Tutorial module* – generally provides instructions about using the program and navigating within the course. If plug-ins or third-party downloads are required, include links within the tutorial. Be detailed in the design document about what information your tutorial module will contain.
- *Overview module* – typically presents an introduction to the content to be covered within the course, including course objectives and a brief description of the roles or responsibilities of the people being trained.
- *Content modules* – state the intent to organize core content into one or more brief, logical modules. You will expand upon details about content modules in the Preliminary Course Plan section later in the design document.
- *Wrap-up module* – summarizes key information presented in the course and provides concluding thoughts. Often, the wrap-up module will include additional resources or an action plan.
- *Assessment or user evaluation* – assessment and evaluation details are spelled out later in the Testing and Evaluation Strategy section of the design document, but the inclusion of these pieces is introduced here as a course component.

Module components

Because a course, especially a long one, is typically broken up into a series of modules, you'll want to document the items or screens that should be standard across all modules. For example, your design standard might be that each module opens with an animated title screen or a synchronized musical introduction, or you may want to include a printable job aid or a summary of key points at the end of each module. Documenting such decisions ensures consistency and uniformity from one module to the next.

Interface and navigation controls

Other global course elements to consider include the interface and navigation controls that will appear on each screen of the program. Describe the informational sections the interface will incorporate, which may include course title, module title, progress indicator or location within the module, or a text prompt that provides instructions for what to do next.

If you plan to use submenus or other means to allow users to jump directly to specific topics or points within a module, provide a description of those here too. For example, you may choose to have a topic menu running down one side of the screen that is visible at all times and which links to subsections within the module. Alternatively, such a menu could be a pop-up from a button in the interface.

Describe the basic navigational controls that allow users to progress through the program in the design document as well. This typically includes Next, Back, Help, and Exit, along with any other features your design team chooses to add. For instance, you might want to include buttons that let the user replay a screen, toggle audio on and off, or launch a course glossary or other resources.

Design strategy

The Design Strategy is the core of the project and typically the longest section of the design document. Here we document methods, strategies, and constraints for presenting content, engaging users, and evaluating their learning.

Treatment and/or themes

If your program will consistently apply a themed treatment, identify it clearly and get any necessary approvals early in the design process. For example,

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you might have a character or "personality" who leads the user through the content, a running theme that defines the graphical look, such as "space" or "high tech," or simply a style or color scheme to which the interface and all graphical elements must adhere. Although your team may not actually develop graphics until later in the process, you will want to identify the "look and feel" early so your designers can use appropriately themed language and examples when writing supporting content.

Figures 1 and 2, at right, show examples from a course in which developers did not identify stylistic themes at the outset of development. Notice that the style of graphics is inconsistent with the interface, and even inconsistent with each other from one screen to the next. By contrast, notice that the graphics in Figures 3 and 4 on page 6 are cleanly integrated with the interface.

Instructional methods

Most e-Learning courses use a combination of instructional methods to provide information to the user. The design document should list the agreed-upon methods for the current course. Common instructional methods and their uses may include:

- *Presentation* – short chunks of material presented to the learner to read.
- *Demonstrations and/or behavior modeling* – video and/or animations to demonstrate tasks and procedures.
- *Case studies and/or problem-based learning* – detailed explanation of a situation or problem that users must analyze and offer findings, recommendations, or solutions.
- *Graphical illustrations* – still or animated graphics, photos, charts, and diagrams to reinforce content or illustrate processes.
- *Audio* – voiceover narration to reinforce onscreen text.
- *Interactions* – integrated opportunities throughout the instruction that allow users to explore content, apply knowledge, and check understanding through questions, games, and activities.
- *Simulations* – interactive environments that simulate real work experiences and conditions.
- *Blended learning* – combination of the e-Learning approach with more traditional teaching methods, including classroom instruction and on-the-job training.

Interactivity

The best e-Learning programs are rich in simulations and interactive experiences that engage learners and increase retention. However, as with many design decisions, there is a trade-off and compromises may be required. Your available resources, time, and budget must factor into any planning. You can develop meaningful interactivities with limited time and money, but be wise about the activities you create. Focus on the content and developing an instructionally sound program, not on creating flashy elements just because you can. Some questions to ask yourself include: What types of interactions are

Figure 1
Course screen with no clear graphic theme.

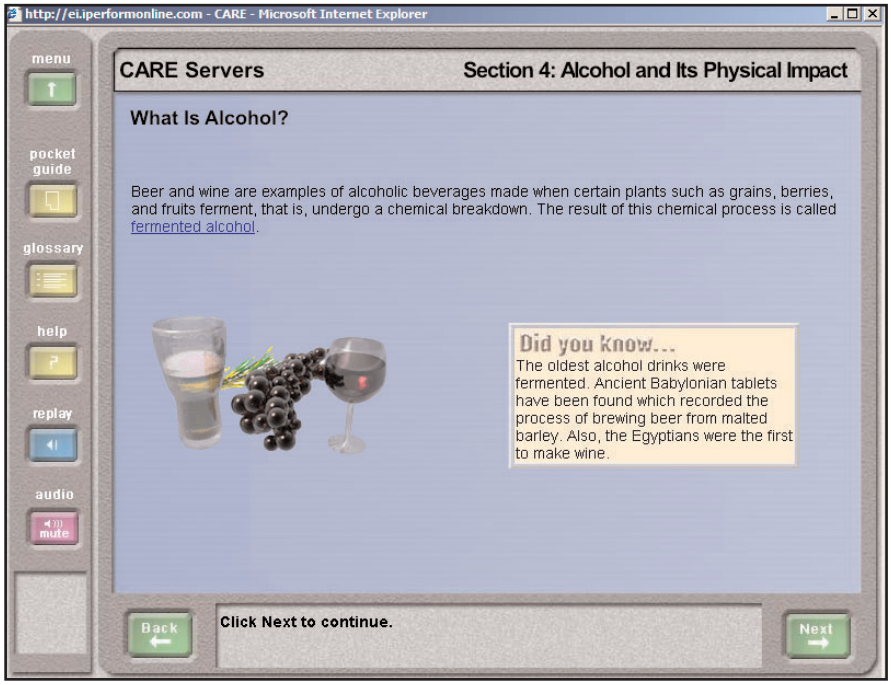


Figure 2 **Style of graphics is different than Figure 1, even though this screen is from the same course.**

appropriate for the course? How and why will they be used? How frequently will they be used?

Table 1, below, shows an abbreviated version of typical guidelines for interactivity used in our course development. The table lists the team's and client's agreed-upon reasons for choosing to apply an interactive element, and strategies for making the interaction relevant to the content.

Testing and evaluation strategy

Among the most important components of any course are the measurements you put in place to assess the course's success. Your documented testing strategy should outline the following:

- The levels at which you will be evaluating course results (reaction, learning, transfer and application, and/or business results)
- The format of the assessment(s), and how they will be administered
- The number of questions, if a traditional test
- The passing score
- The retake options for those who don't pass
- The remediation plan for incorrect performance or responses
- The proctoring requirements, if any

Constraints

Often, there are limiting factors to course development that are outside your ability to control. In some cases, you may have already identified these constraints, particularly technical considerations, in other parts of your design document. Whether constraints are scattered throughout your document in the relevant locations or compiled in a single section of known issues, you should always document those things that are likely to require compromises or affect any aspect of design, development, or delivery of your course.

For example, in a recent development effort we repurposed content from a series of eight-hour workshops to a comparable series of online courses. Feedback from potential clients strongly discouraged online courses that exceed three hours, so we identified a constraint stating that we may scale back or de-emphasize extraneous or non-critical information, with input from subject matter experts, in order to meet the targeted course length. Similarly, because the program was a precursor to certification, we had to take care not to eliminate information that is tested on the certification exam.

Preliminary course plan

The course plan is where we begin to structure the format, sequence, and presentation of specific content. It is essentially a high-level outline that breaks course objectives and content into modules, makes preliminary recommendations for interactivities to support various content points, and estimates the length for each module. The course plan may also include a flow chart to visualize complex interactions or branching, if needed. Depending on the needs of the project or client, a more detailed course plan may follow the preliminary or sample course plan included here, as a separate deliverable, after approval of the design document.

Technical specifications

Before you can begin development, you will need to define the technical specifications to which you are developing. Here, especially, we learned from our previous experiences of building e-Learning sans a formal design plan.

Development tools

Have you ever storyboarded an e-Learning course without knowing which tools you would be using to build the final product? We have. We were eager to move forward in the next phase of our e-Learning presence, and ended up a little too far ahead of ourselves. We were lucky that our final tool selection did not result in a major redesign, though some modifications were required to fit the template-based system we chose. More disappointing was that with the new development tool, we suddenly had access to many new templates we had not previously anticipated. Had we selected the tool first, our design could have been so much richer. The moral of the story? Don't let your tools restrict your creativity, but do at least know what they are so you can design to their strengths and find workarounds for their limitations.

Table 1 *Interactivity guidelines*

Reason for interaction	Strategy
Explain and support concepts	• Use to emphasize key concepts or highlight key points • Use to provide structure to detailed or complex content • Use to allow learner control over content/sequencing • Use to challenge learners prior to introducing new concepts
Practice and apply learning	• Make practice opportunities meaningful and interesting • Use after presenting key concepts • Use when knowledge/skills need to be internalized • Use to help learners differentiate between good and poor performance
Check learner understanding to determine if course objectives are being met	• Directly relate questions to at least one module objective • Provide positive reinforcement that the user is making progress • Provide positive intrinsic feedback that demonstrates the ineffectiveness or risks of poor responses and the value of good responses

The actual tools you select will depend on factors specific to your organization and your budget. There are many good authoring packages out there, some of which require more programming skill than others. After some trial and error, we are currently using a template-based system that allows our instructional designers to build the courses themselves with no programming knowledge required. The trade-off is that while we can develop courses faster and cheaper, we are more limited in some of our development options. In more recent courses, we have been able to get around this to some degree through creatively designed Flash elements in place of some static graphics; though that has caused our development time and cost to creep back up. These considerations should factor into your design plan.

File naming conventions

Once you begin designing your course and creating related documents and media, what do you name the files? Always establish file naming conventions up front so all team members can easily create, find, and retrieve the various course and media elements. There is no universal standard for naming and storing files – just make sure your naming scheme makes sense to your team members and within your organization, and is easy to remember.

Course identifiers

At EI, we begin with a unique course identifier that becomes a prefix for all media elements related to that course. For example, we have a course for restaurant servers currently in development. The course identifier we use is LLFB01. Decoded, the LL indicates the course is for a line level position, the FB indicates the position is within the Food & Beverage department of a hotel, and the 01 indicates that this is the first in a planned series of line-level food and beverage courses.

Frame numbers

Next, we express conventions for referencing individual screens within a course. Our usual standard is a four-digit frame ID that identifies the module number and frame number, sequenced in increments of 10 to allow for inserting additional frames, or screens, later without disrupting the naming scheme. Thus, we might number frames for the first module of a course 1000, 1010, 1020, etc., with the second module beginning at frame number 2000 and the third module beginning at frame number 3000. We might assign the number 1015 to a new frame, added later between frames 1010 and 1020.

Media and other files

We then use a combination of the course identifier, frame number, and media type to name media elements and link them to specific screens within the course. We might therefore name an animated graphic for screen 1010: LLFB01_gfx_1010.swf. Finally, we also detail comparable conventions for naming work product and resources such as storyboards, the course glossary, and help files.

Delivery hardware and software

Many design decisions will be constrained by the technology of the end user. It is therefore crucial to identify the target delivery platform. Are there limita-

Figure 3
Photos are integrated with interface in a common theme.

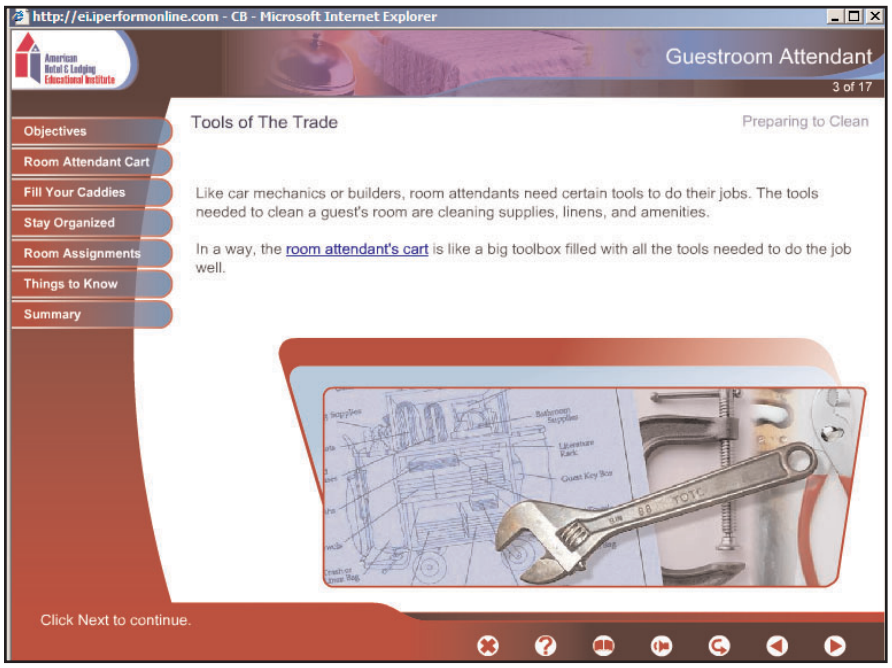


Figure 4 **Original graphics are integrated with interface.**

tions of operating system, screen resolution, Web browsers, plug-ins, or other software that you must contend with? Will users be on a dial-up or broadband connection? What are the hardware specifications of the end user?

Once you have answered these questions, ask what the design implications are. Systems without speakers or headphones will affect your ability to use audio for presenting content. If most users are on dial-up connections, you may have to avoid high-bandwidth media such as high-resolution video. If users are on a corporate network that locks down systems and prevents installation of software, you'll need to limit your media to the plug-ins and versions that are already available.

Data tracking and interoperability

One lesson EI learned regarding technical standards of interoperability is that if you have any intention of deploying your course on more than one learning management system (LMS), or if there is the possibility of migrating your course to a new LMS down the road, think early and often about how you will get a program that runs fine on LMS "A" to do the same on LMS "B." This means building your course to standards such as AICC (Aviation Industry CBT Committee) or SCORM (Shareable Content Object Reference Model) from the start, and recording decisions about which technical specifications you are adopting in your design document.

By way of example I offer our first effort at building an interactive online course. At the time of development, we weren't thinking ahead to the possibility of licensing our online content to clients for use on their own systems, or the fact that we might not always be so enamored with the LMS we were using at the time. Both of those scenarios came to pass and we found ourselves rebuilding the original course to allow it to communicate with a client's SCORM-conformant LMS. The good news is that the rebuilt course later transferred very nicely when we made our own switch to a new internal LMS.

Related to standards are issues of accessibility and tracking. Accessibility is increasingly becoming a buzzword in e-Learning design, and Section 508 accessibility guidelines should be a factor in your design if you are developing programs for federal agencies, in particular. Even without a Section 508 requirement, it's prudent to document any accommodations (if any) you plan to build into your course for users with visual, hearing, mobility, or other impairments that may affect how they use the program.

Finally, we document the data we intend to track for each user. For our courses, this usually consists of time spent in each module, bookmarked locations, quiz and test scores, and module completion status. Conforming to the appropriate SCORM or other technical specifications allows you to pass this data easily back and forth between the course and the LMS.

Media standards

Media elements play a large role in any online course. As such, we devote a section of our design document to detailing conventions for the various types of media to be included in the project.

Text

With text standards, we lay out a few basic style guidelines such as: write concisely and in the active voice, use short sentences and/or bullets, and "chunk" content to avoid the appearance of dense screens. Writing style is one of the hardest areas to achieve consistency in across a multi-designer team. This section of the design document does not substitute for a good style guide (and you may want to list the specific style references you want your team

Sidebar 1 *Design document outline*

I. Project Specifications
- A. Course overview, description, and objectives
- B. Audience
- C. Length
- D. Deliverables
- E. Existing content resources

II. Standard Course Features
- A. Course components
- B. Module components
- C. Interface and navigation controls

III. Design Strategy
- A. Treatment and themes
- B. Instructional methods
- C. Interactivity
- D. Testing and evaluation strategy
- E. Constraints
- F. Course plan

IV. Technical Specifications
- A. Development tools
- B. File-naming conventions
- C. Delivery hardware and software
- D. Data tracking and interoperability

V. Media Standards
- A. Text
- B. Audio
- C. Graphics
- D. Animation
- E. Video

VI. Project Management
- A. Project team
- B. Development timeline
- C. Quality assurance and pilot testing
- D. Approvals and sign-off
- E. Archiving and maintenance

Don't let your tools restrict your creativity, but do at least know what they are so you can design to their strengths and find workarounds for their limitations.

to use, such as *The Chicago Manual of Style* or *The Gregg Reference Manual*), but it does offer a few helpful hints for instructional designers and technical writers and lets internal or external clients know what to expect in the presentation of text content.

We also specify what reading level we are targeting with onscreen text (e.g., 8th grade reading level for a supervisory level course) and define any standards for how to word text prompts. For example, the instructional text prompt on the last screen of a module in our courses always reads, "You have completed this module. Click Exit to close the window and return to the menu." By specifying these standards early, all of our instructional designers are working consistently. This allows us to focus later quality assurance reviews on content and design, rather than details of uniformity.

Audio

Here, we spell out standards for voiceover, music, and sound effects. For voiceover, we indicate where we will use it and whether or not all onscreen text will be narrated word for word. Some of these decisions will tie into the capabilities of the end user's delivery platform (loudspeakers, bandwidth, etc.) and whether or not you have opted to create a course that is Section 508 compliant or which otherwise addresses accessibility concerns. We also specify where we will use music and sound effects to achieve a consistent effect across the course or product line. For example, we often choose to use music on the opening screen of each module.

Visuals

Visual images essential to online course development are frequently used to provide an example for or otherwise support and reinforce the content onscreen. Our goal is to provide instructionally meaningful visuals, as stated in our design documents.

Graphics

Static, animated, and interactive visual images in e-Learning courses may come from a variety of sources. They could be original images created by

an artist, existing graphics or photos from an internal or stock library, or custom photos taken specifically for the project at hand. There is a cost trade-off for original graphic design or custom photography vs. limitations or suitability of "generic" images from a stock library; these considerations should factor into your planning.

List other graphic standards here too. For example, standards we have documented in the past include graphically calling out key points or fun facts in a stylized text box and including an animated opening title sequence at the start of each module.

Video

Like audio, the use of video will depend on the delivery hardware. If users are on dial-up connections, consider using shorter video clips and higher compression settings. Higher compression results in smaller video windows and lower resolution, so you might want to test settings on a dial-up connection to achieve the desired balance between video quality and download speed.

Typically, for an e-Learning course we also specify the source of video footage – either from existing assets or new video production. Obviously, new video production will impact your project's timeline and budget. When we choose to use clips from existing videos to present new information, or to reinforce or demonstrate concepts presented in the course, we provide guidelines in the design document for what is acceptable. This usually means that existing video content must be current, accurate, and relevant, and footage should not appear "dated" (clothing, hairstyles, etc.). Finally, we define screen location standards for the consistent placement of video on each screen that uses it.

Project management

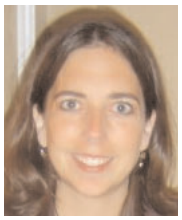
Although not essential to the actual design of the course, you may want to conclude your design document by including project management details that might be helpful for future reference. Such details would include:

- *Team members* – a list of project team members along with their roles and responsibilities. Team members may include the project manager, instructional designers, programmers, graphic artists, audio and video producers, quality assurance reviewers, customer and/or client contacts, and subject matter experts.
- *Key dates* – a development timeline with milestone dates for key tasks and deliverables.
- *Quality assurance and pilot testing* – are there quality assurance reviews or a pilot testing phase before full launch of the course? If so, who will be involved and how will you collect and process feedback?
- *Approvals* – who gives final approval and sign-off that the project is complete?
- *Archiving and maintenance* – how and where will files be archived or backed up? How will the program be maintained or updated in the future? Is there an anticipated revision cycle?

Conclusion

There is a lot to think about, and a lot of work involved, in writing a well-crafted design document, which means that it is a step often omitted from the development process. The good news is that when you have a detailed design plan in place, it becomes your standard for development, and the course practically writes itself. If you have never written a design document before, the hardest part is writing the first one. The truth is that after you've written it once, you have a template for all future e-Learning programs. (See Sidebar 1 on page 7 for an at-a-glance design document outline.) Much of the information will be fairly static and won't change dramatically from one course to the next. Just remember that it is a living document. If it is not perfect or complete at first, you can continue to refine it as your team learns and your needs evolve.

Author contact



Monique Donahue is Director, Research and Development for the Educational Institute (EI) of the American Hotel & Lodging Association. She got her start in instructional design and technology-based education with a Department of Defense contractor in the early 90s, and then brought her knowledge to the convenience store industry before joining EI in 1997. She has created training and certification programs for major hospitality and entertainment corporations using a variety of delivery media. Monique currently oversees the development of all e-Learning, video, and print-based training programs at the Educational Institute. She holds the designation of Certified Hospitality Trainer (CHT) and is a member of the University of Central Florida (UCF) Instructional Systems Advisory Council. Contact Monique by email at mdonahue@ahla.com.

Additional information on the topics covered in this article is also listed in the Guild Resource Directory.

Writing style is one of the hardest areas to achieve consistency in across a multi-designer team. (The media standards) section of the design document does not substitute for a good style guide.

About the Guild

THE eLEARNING GUILD

A Worldwide Community of Practice for e-Learning Professionals

The eLearning Guild is a Community of Practice for e-Learning design, development, and management professionals. Through this member driven community we provide high-quality learning opportunities, networking services, resources, and publications. Members represent a diverse group of managers, directors, and executives focused on training and learning services, as well as e-Learning instructional designers, content developers, Web developers, project managers, contractors, and consultants. Guild members work in a variety of settings including corporate, government, and academic organizations.

Guild membership is an investment in your professional development and in your organization's future success with its e-Learning efforts. Your membership provides you with learning opportunities and resources so that you can increase your knowledge and skills. That's what the Guild is all about ... putting the resources and information you need at your fingertips so you can produce more successful e-Learning.

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eLearning Insider	✓	✓	✓	✓
Annual Salary Survey	✓	✓	✓	✓
Past Conference Handouts	✓	✓	✓	✓
Resource Directory – Access & Post	✓	✓	✓	✓
Info Exchange – Access & Post	✓	✓	✓	✓
Job Board – Access Jobs & Resumes	✓	✓	✓	✓
Job Board – Post Resumes	✓	✓	✓	✓
Job Board – Post Jobs	✗	✓	✓	✓
Guild Research – Online Briefings	✓	✓	✓	✓
Guild Research – Reports	✗*	✓	✓	✓
Guild Research – Archives	✗	✓	✓	✓
Learning Solutions e-Magazine	✗*	✓	✓	✓
Online Events Archive	✗	✗	✓	✓
Online Forums	$	$	✓	✓
Online Symposiums	$	$	✓	✓
Face-to-Face Conferences	$	$	$	✓*
Pre-Conference Workshops	$	$	$	✓*
Event Fee Discounts	✗	20%	20%	20%
Online Event Site License Discounts	✗	✗	20%	20%

**See www.eLearningGuild.com for details*

✓ = Included in Membership ✗ = Not available $ = Separate fee required

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February 8 - 10, 2006
ONLINE

The Rapid eLearning ONLINE Symposium
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April 18 - 21, 2006
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April 18 - 21, 2006
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Learning Management Colloquium
April 18 - 21, 2006
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