openlearning

Internal Policies, Processes, and Procedures (3Ps) for Online Learning Platform Project Implementation

Introduction

Similar in importance to **planning**, the following "3Ps" are essential for project implementation in any organisation: **p**olicies, **p**rocesses and **p**rocedures.

Policies are important because they address the issue of what constitutes the acceptable rules of a project. This should be management-level guidance and objectives given to all departments.

Process describes the patterns of work and usually details the steps needed to complete a task. Look at it as a workflow for the business or a way of ensuring compliance to the said policies.

Procedures are the defined sequences of steps to be followed in a consistent manner. They are helpful because they are a practical way to ensure that the project runs in an organised manner.

Defining the 3Ps in project implementation helps to:

- Ensure consistency and understanding across the business
- Reduce confusion during implementation
- Identify areas for efficiency gains or controls
- Identify organizational impacts and plan for them accordingly
- Increase awareness of challenges and critical points in your organization prior to implementation
- Ensure that everything works as expected after implementation
- Speed up requirement gathering and documentation for the new implementation
- Incorporate many of the planned process improvements even before implementation begins

The First 'P': Policies

Not only do policies help to communicate ideas, but they also ensure that any ignored or unknown risks are being addressed. Some of the policies that you should consider setting in place when implementing an Online Learning Platform are:

- Course Creation Policy
- Content Ownership Policy
- Content Review And Retention Policy
- User Provisioning Policy
- User Access Policy
- Community And Support Policy
- Onboarding And Offboarding User Policy

The common policy that shows up in almost every organization's implementation of an online learning platform is the User Provisioning Policy. Such a policy enables the organization and its users to find information about getting onboarded and using the platform smoothly. A simple User Provisioning Policy would identify the person in charge, the onboarding actions to take, and the end result of those actions.

Sample Policy: Training Providers
An example of this would be a training provider who is using the platform to conduct training: in this case, the training provider has issued a User Provisioning Policy stating that all external learners are to be treated as portal users and shall create their individual account prior to the training session.

Sample Policy: Private Universities
Another example of this would be a private university issuing a User Provisioning Policy for each end user to follow: under this policy, the learner's application must first be vetted by the administrative team. Once approved, the learner's account shall be created by an automated system that has been integrated with OpenLearning.

The Second 'P': Processes

Processes allow you to see the big picture by outlining the workflows involved in providing products and services which are in compliance with the organisation's policies.

This means the institution will describe the process of each policy at a high level to guide each user and staff member to be able to understand what action will be taken by who and when.

With our earlier use case of a User Provisioning Policy for **training providers**, the process would be:

1. The external learner registers for an OpenLearning account individually
2. The external learner provides their account information to the institution for the next step.

As for the **private institution**, their User Provisioning Policy has a few extra rules compared to the training provider use case. As such, their process would be longer:

1. The learner submits the required documents to the administrative team for vetting
2. The administrative team confirms the learner's eligibility
3. The administrative team prepares the application details for registration
4. IT department prepares the automated registration via the LTI/API integration
5. The learner's account is created on OpenLearning and the user credentials will be sent to the learner automatically via the platform.

Now that the process has been described, let's get into action with the procedures.

The Third 'P': Procedures

Procedures elaborate the step-by-step actions involved in each process and how an individual would perform them. We will jump straight into the procedures from our use cases above.

User provisioning procedure for the training provider use case:

No.	Action Description	By
1	Register for an account on https://www.openlearning.com	Learner
2	Verify the account after registration	Learner
3	Provide account details, including full name, email address used, and the intended course	Learner

User provisioning procedure for the private university use case:

No.	Action Description	By
1	Submit all required documents to the institution's administrative team	Learner
2	Vet all received documents to verify the learner's eligibility	Admin Team
3	Prepare a list of learners' details for registration including: full name, IC, university email address, registered programme, registered semester	Admin Team
4	Call/create event trigger to register the given list of learners	IT Team
5	Account is created based on the given details	Platform
6	User credentials are sent to the learner's email address	Platform

In order to scale, institutions should have a system. The system should use the policy, process and procedure (3Ps) method because it has been shown to work in various use cases.

To recap: the 3Ps method starts with identifying a task that you currently have in your institution. Then, create a **policy** or a set of rules and guidelines. Next, outline the overall **process**. From there, create the **procedure** or exact steps that someone will take to complete the task.

Golden Rules

Every task that is performed more than twice in a business or project must have a policy. Whether or not you use all the policies, processes, and procedures depends on the needs of the business.

Do take the time to weigh the pros and cons of setting new policies in place when implementing an online learning platform, especially if there is a chance that the policies will interfere with the institution's existing platform. It is also advisable to take into consideration the amount of importance placed on complying with your current board's requirements as well as the local authorities'.

What's Next?

We encourage you to share the 3Ps of your online learning platform project with your OpenLearning onboarding representative during the initial stage of the implementation to allow our team to assist you in aligning with either technical or business procedures.