

CEdMA Workshop, 24th January 2006

Avid Technologies, Pinewood Studios

**What the surveys are saying
What's new in e-learning
What's rapid e-learning**

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The E-learning Market: Key Trends and Predictions – *Training Mag* (Sep 05)

Prediction 1

E-learning is becoming part of knowledge management. "Building on the concept of uniting informal and formal learning materials within an e-learning infrastructure, e-learning is moving out of its traditional silo and is becoming part of a larger approach to knowledge management. The value of linking a portal to a learning management system (LMS) comes from creating a single location for corporate information, learning, and collaboration. In spite of these benefits, IDC believes that less than 10 percent of corporations deploying an LMS integrate the software with a corporate portal. IDC expects this percentage to rise over the next few years." This quote comes from "Worldwide and U.S. Corporate E-learning, 2004-2008 Forecast," a report by IDC, a research firm in Framingham, Mass.



The E-learning Market: Key Trends and Predictions – *Training Mag* (Sep 05)

Prediction 2

The outsourcing of all or portions of important business processes, including e-learning, continues. The same report predicts: "E-learning vendors will be forced to address this trend in their overall strategy, particularly in terms of partnerships. Outsourced e-learning services will not be offered solely by e-learning vendors but increasingly as part of larger HR BPO contracts. E-learning players who can successfully partner to offer outsourcing options will expand market reach. Those who fail to address the demand for outsourced e-learning services will find it increasingly difficult to compete."



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Prediction 3

Rapid e-learning is the fastest-growing segment of the e-learning market.

"Rapid e-learning (Web-based training programs that can be created in a few weeks and are authored largely by subject-matter experts) grew 80 percent over the last year and will continue to grow at an annual compound rate of 40 to 50 percent over the next two years," says Josh Bersin, principal and founder of Oakland, Calif.-based research firm Bersin & Associates. "Today, it accounts for more than one-third of all current training-related projects and is expected to be employed for nearly half of all e-learning initiatives within the next three years."



The E-learning Market: Key Trends and Predictions – *Training* Mag (Sep 05)

Prediction 4

Externally hosted LMS customers are significantly more satisfied than those that run LMSs internally. "Likely, this is because outsourced LMS systems reduce cost, complexity and resource requirements and are much more likely to be completed on schedule and within predicted budgets," Bersin says.



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Prediction 5

High-quality content is the most-important factor used to determine the success of e-learning efforts, according to Stamford, Conn.-based research firm Gartner. Its report, "2005 E-learning Client Issues," says, "The content market will prove more lively because quality matters above all; new content and new media for delivering content [are] a 'hot spot' of innovation."



The Four Stages of e-Learning – Josh Bersin (Oct 05)

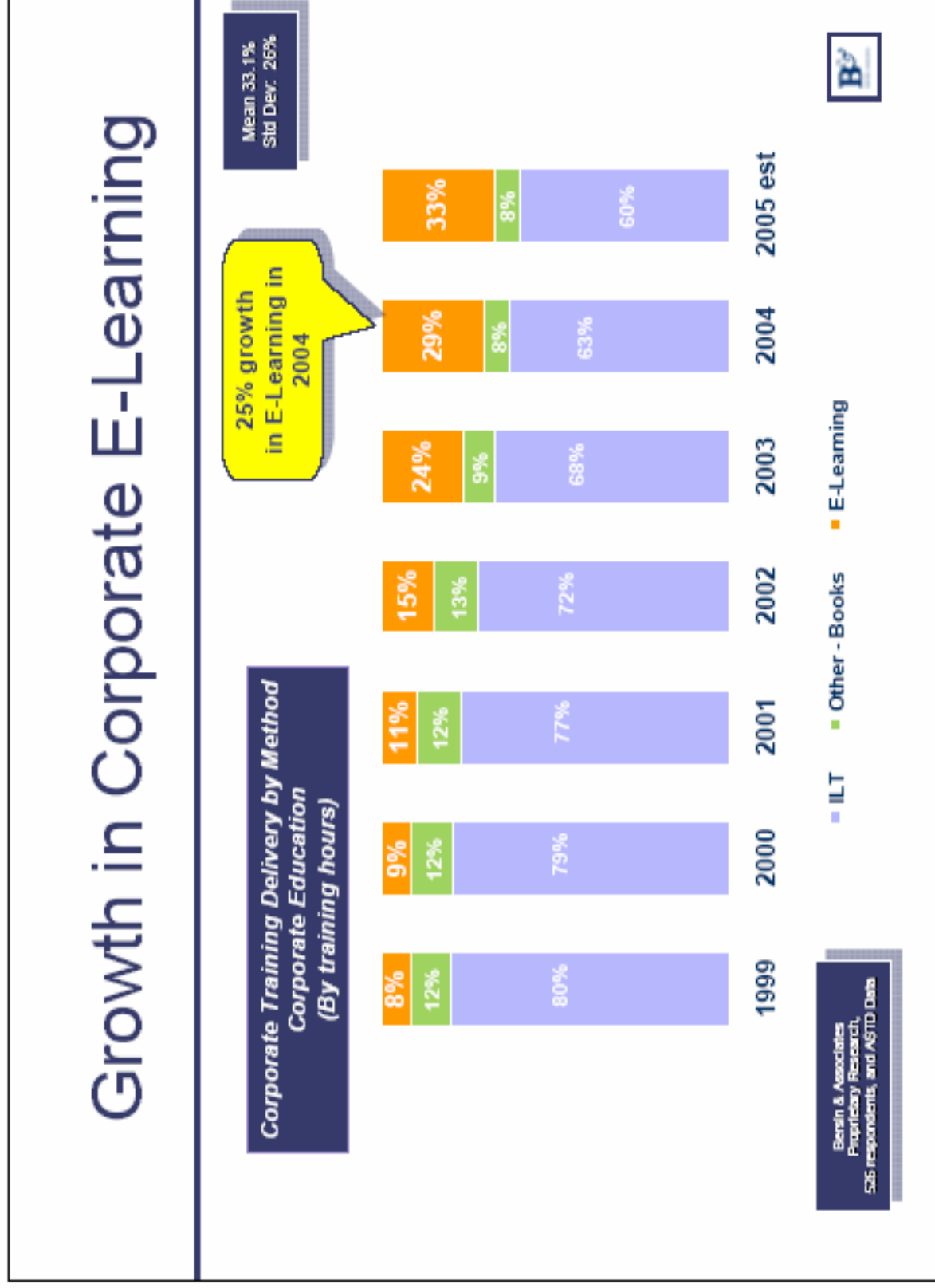


Figure 1: E-learning Market Growth by Delivery Method

The Four Stages of e-Learning – Josh Bersin (Oct 05)

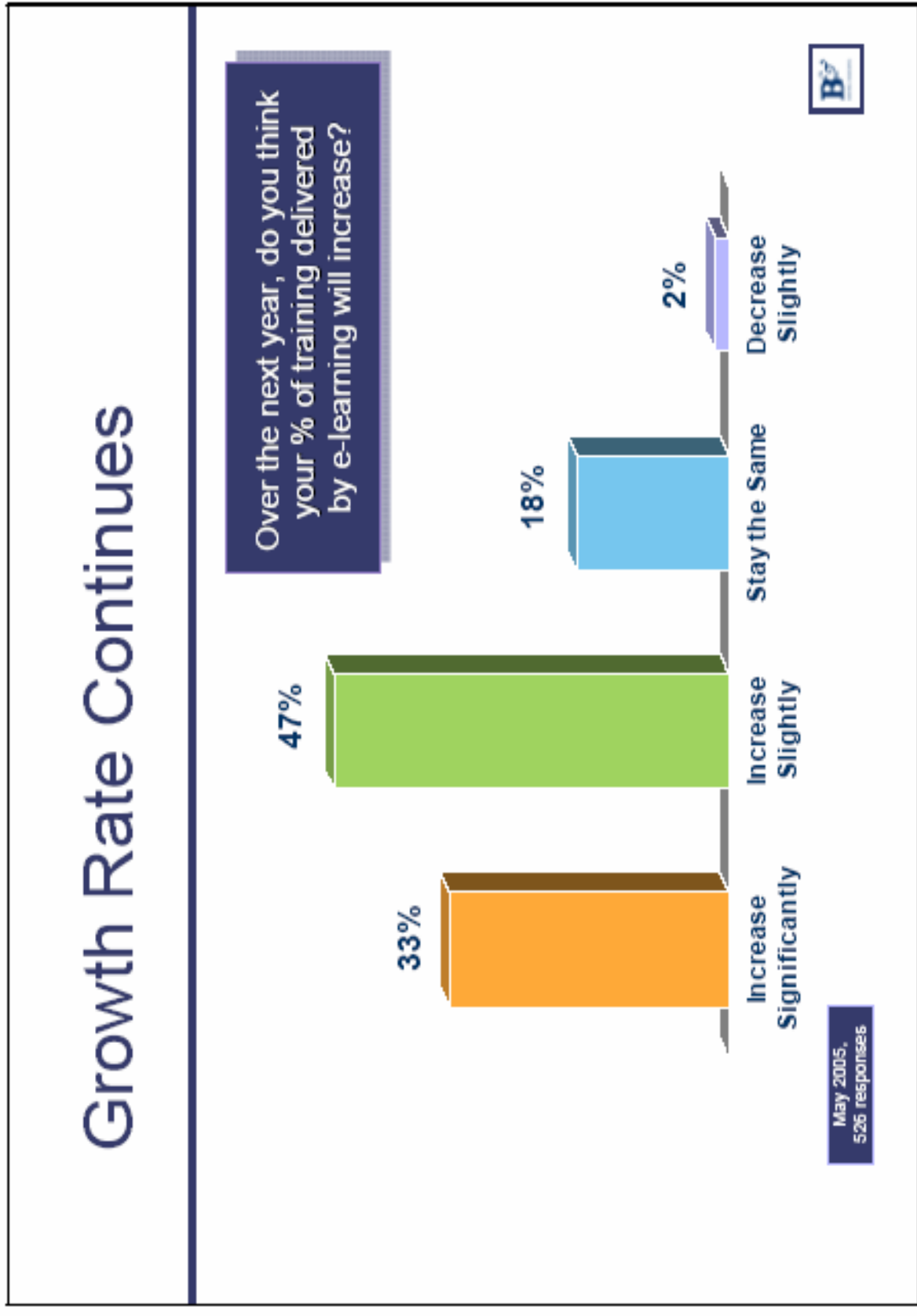


Figure 2: Market Growth Continues

The Four Stages of e-Learning – Josh Bersin (Oct 05)

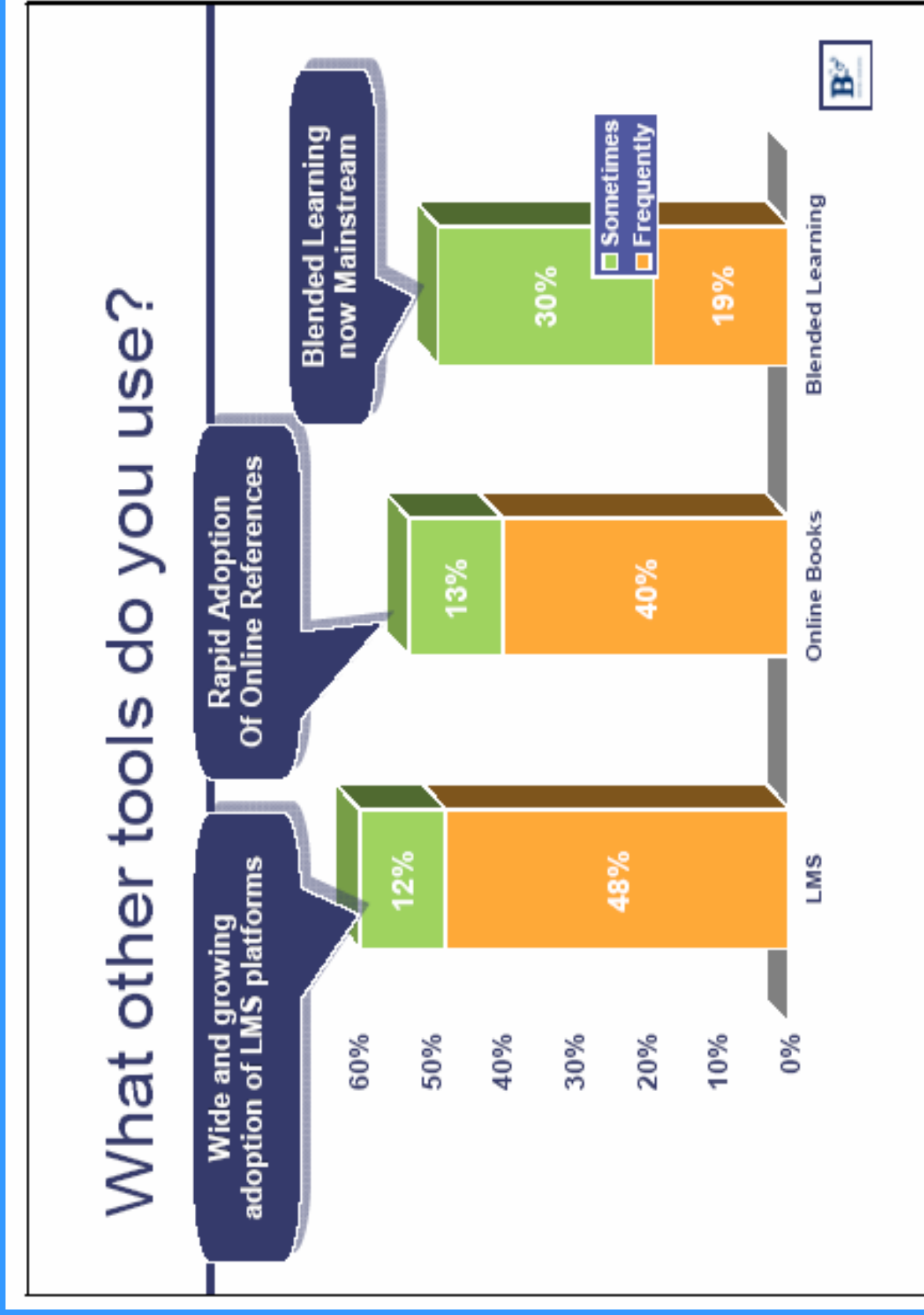


Figure 6: Adoption of LMS, Online Books, Blended Learning

The Four Stages of e-Learning – Josh Bersin (Oct 05)

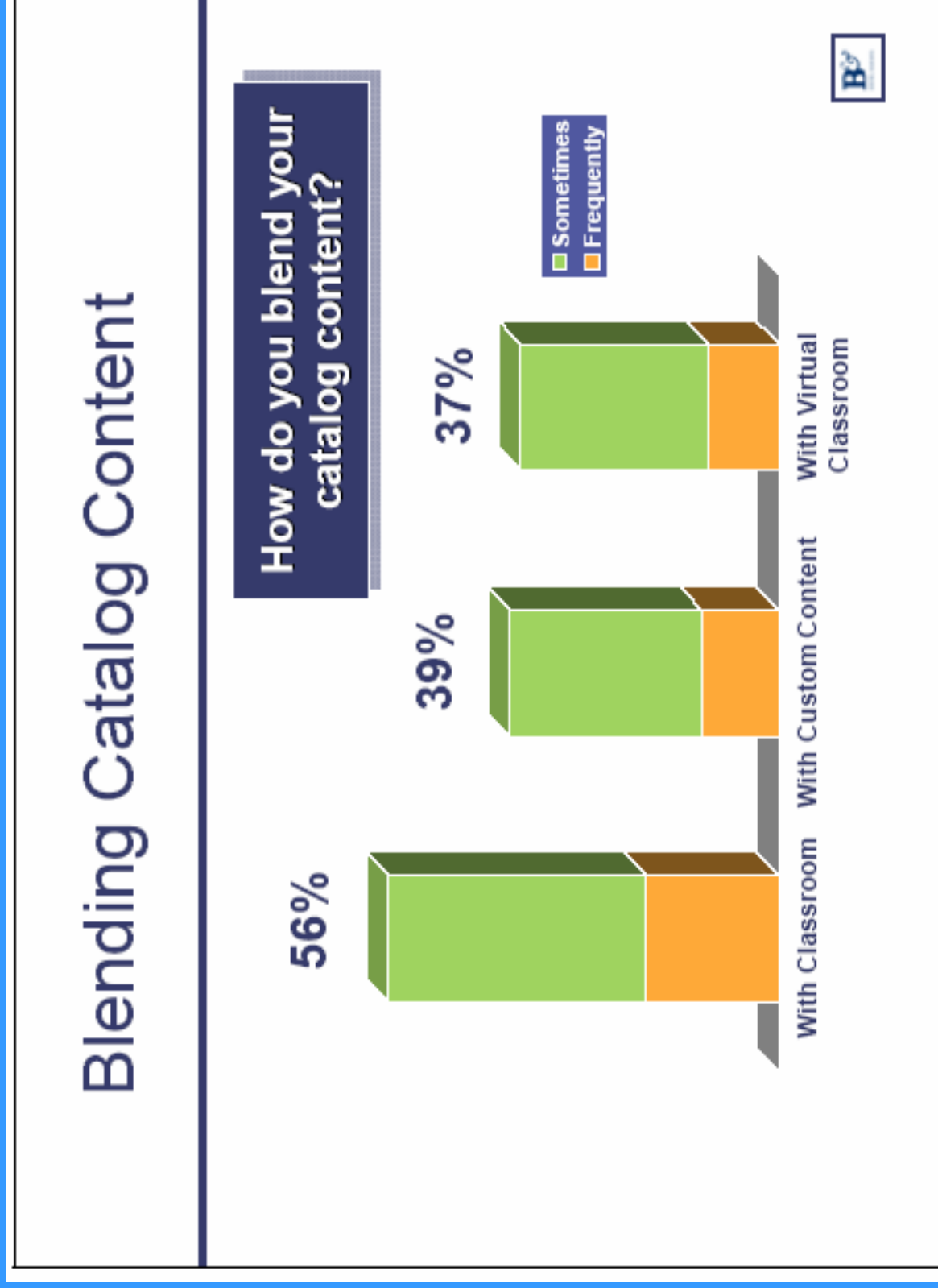


Figure 7: Blending of Catalog Content

The Four Stages of e-Learning – Josh Bersin (Oct 05)

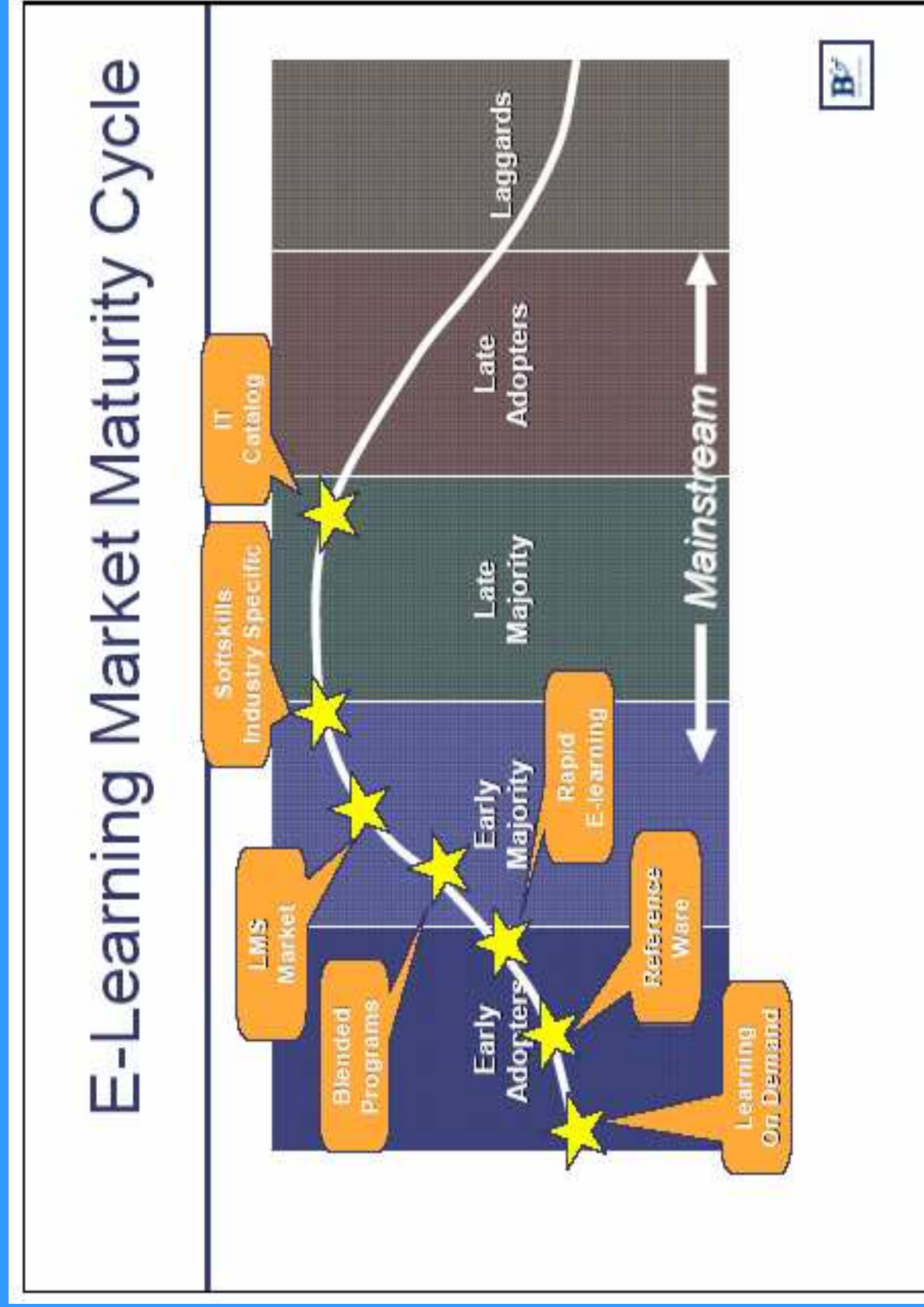


Figure 9: E-Learning Market Maturity Cycle

The Four Stages of e-Learning – Josh Bersin (Oct 05)

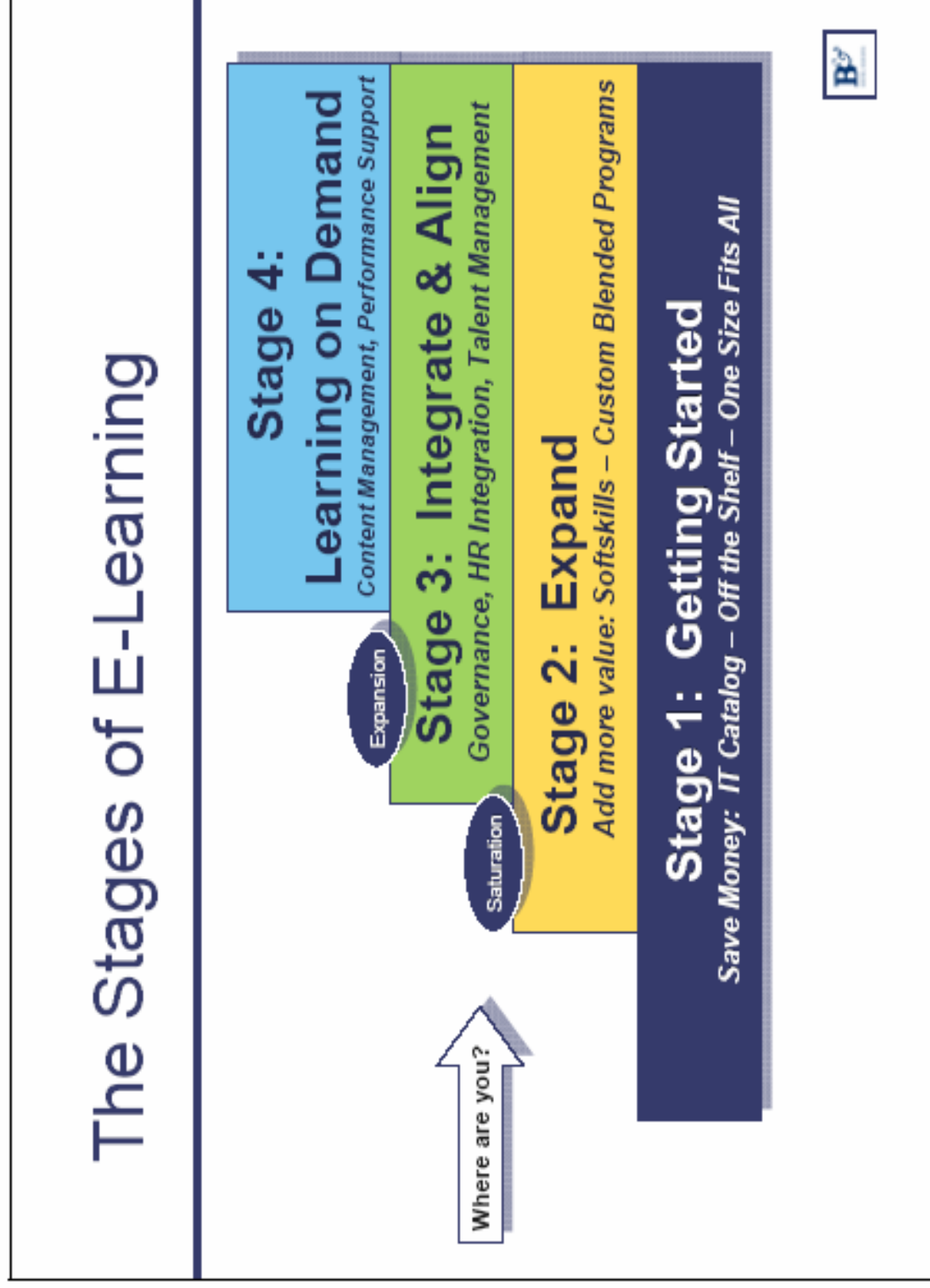


Figure 10: The Stages of E-learning

The Four Stages of e-Learning – Josh Bersin (Oct 05)

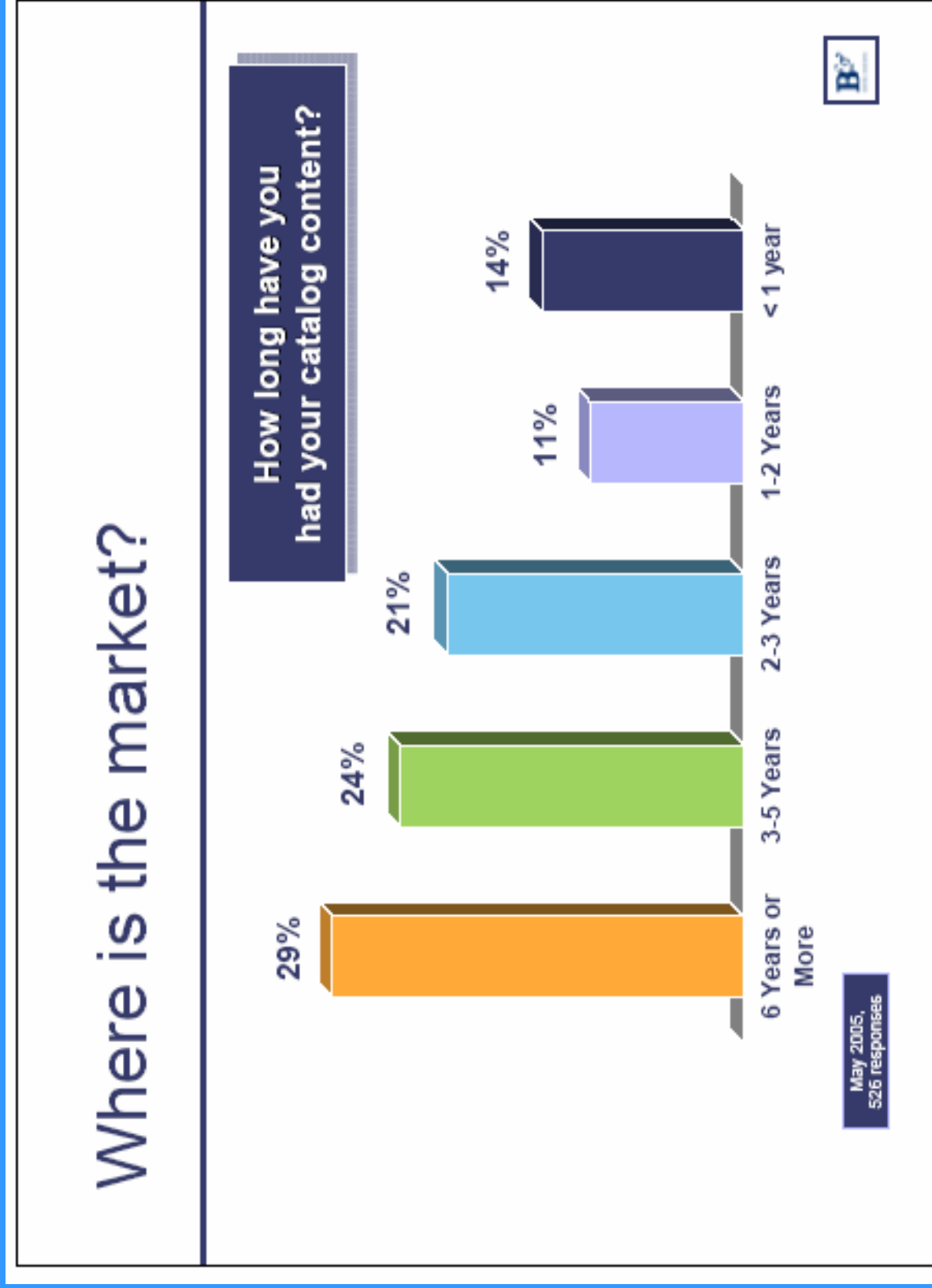


Figure 11: Customer Market Maturity

The Four Stages of e-Learning – Josh Bersin (Oct 05)



Figure 12: Maturity by Organization Size

The Four Stages of e-Learning – Josh Bersin (Oct 05)

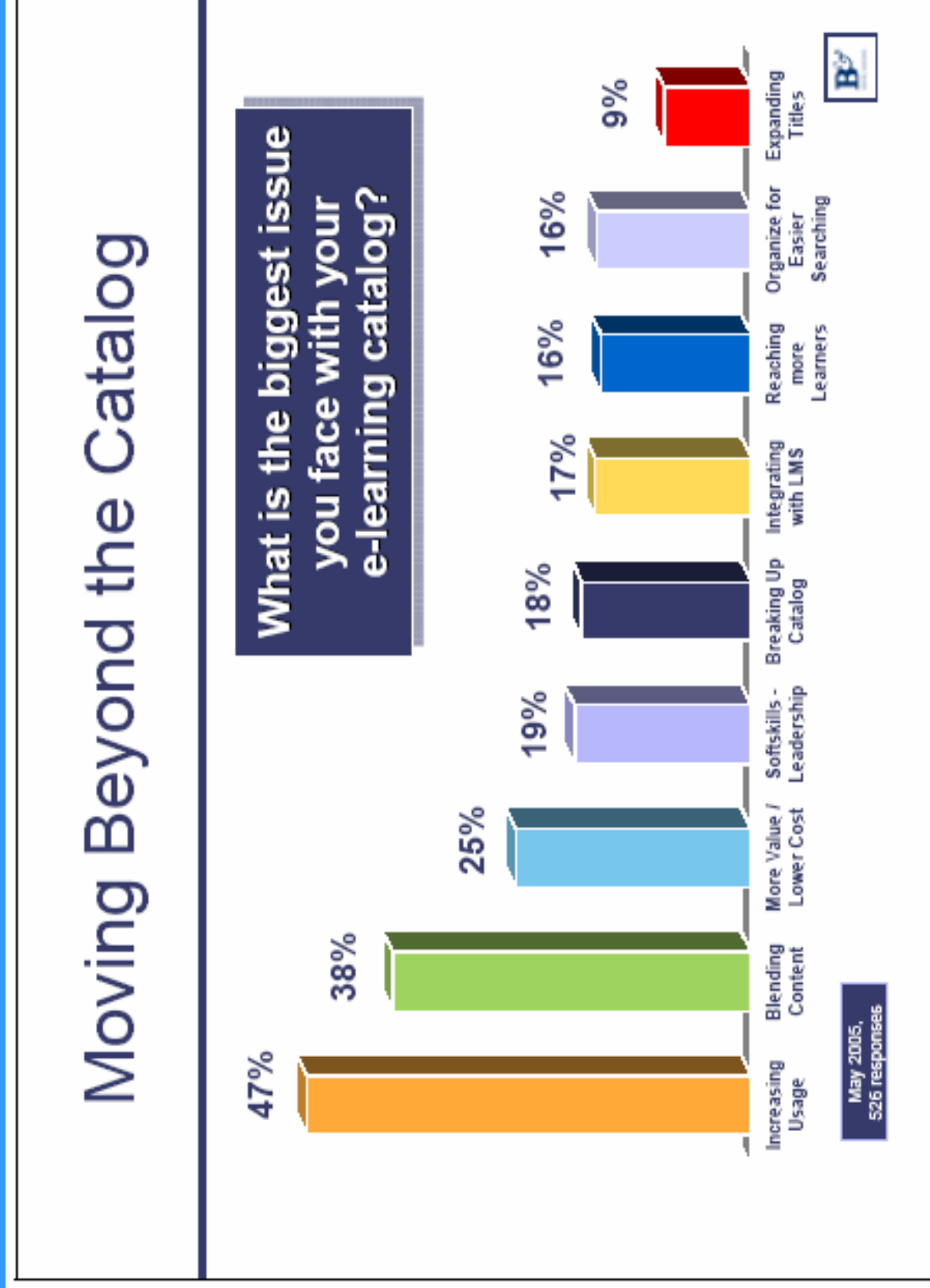


Figure 14: Biggest Issues for Stage 2 Organizations

The Four Stages of e-Learning – Josh Bersin (Oct 05)

Top Learning Priorities

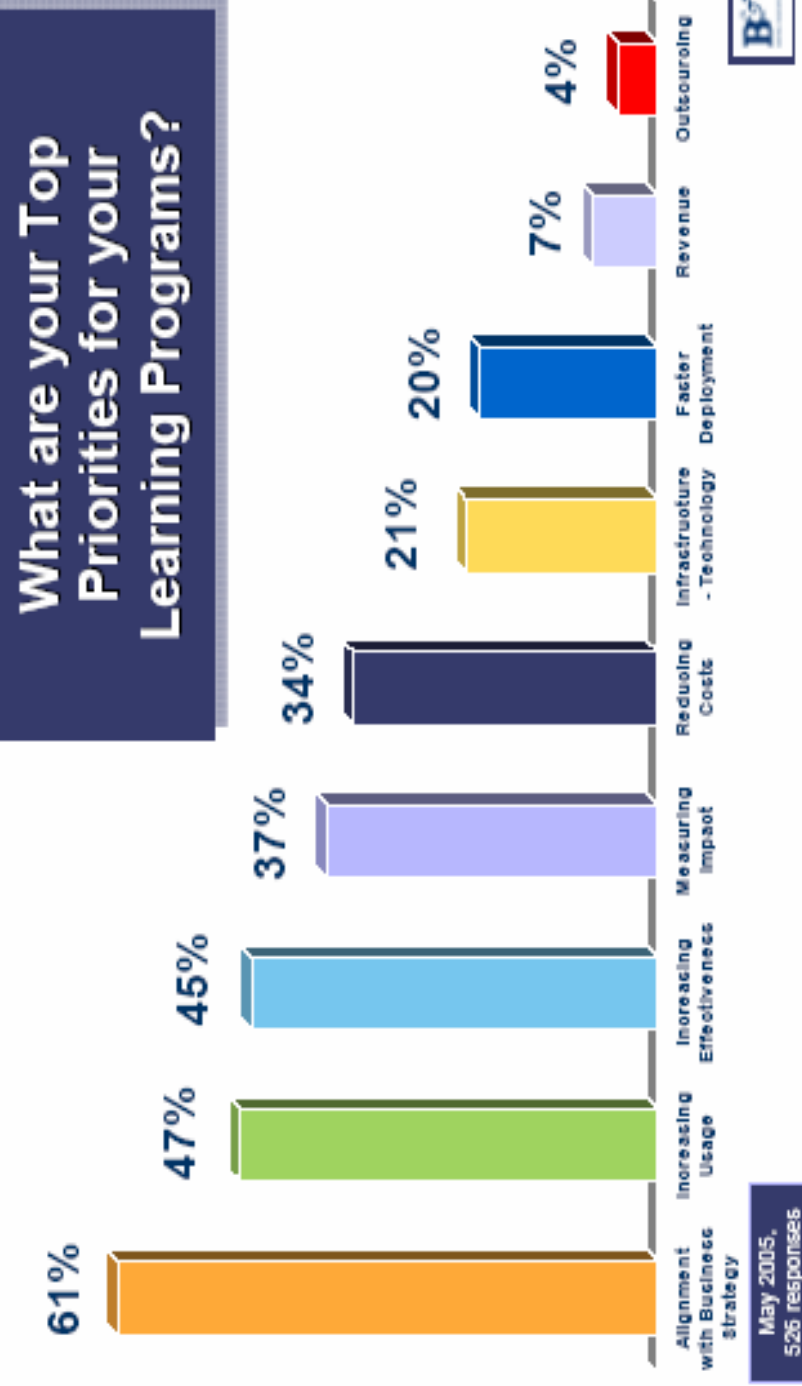


Figure 21: Alignment - Top Learning Priorities

The Four Stages of e-Learning – Josh Bersin (Oct 05)

Signs of Approaching Stage 3

Can you say the following?

“E-learning is no longer looked upon as a way to drive down the cost of training: it is a business performance improvement tool”

“E-learning is a tool for increasing reach, efficiency, and impact – not an end in itself”

“We do not measure e-learning adoption any more. We measure its effectiveness.”



Figure 24: Signs of Approaching Stage 3

The Four Stages of e-Learning – Josh Bersin (Oct 05)

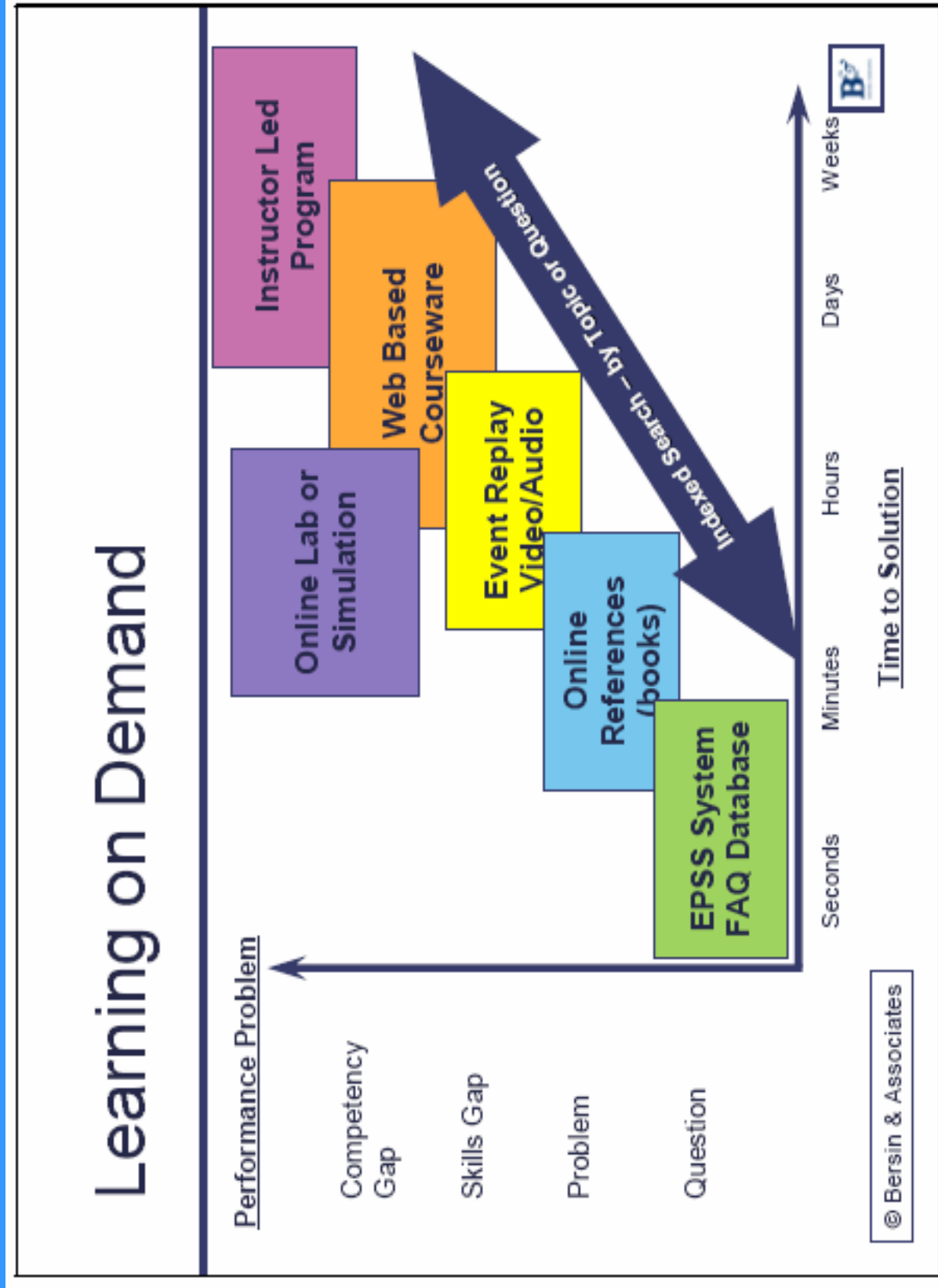


Figure 26: Learning on Demand Content Map®

The Four Stages of e-Learning – Josh Bersin (Oct 05)

Drivers for Rapid E-Learning

“What is the biggest challenge you face in content development?”

#1 Problem:

It takes too long to build courses.

#2 Problem:

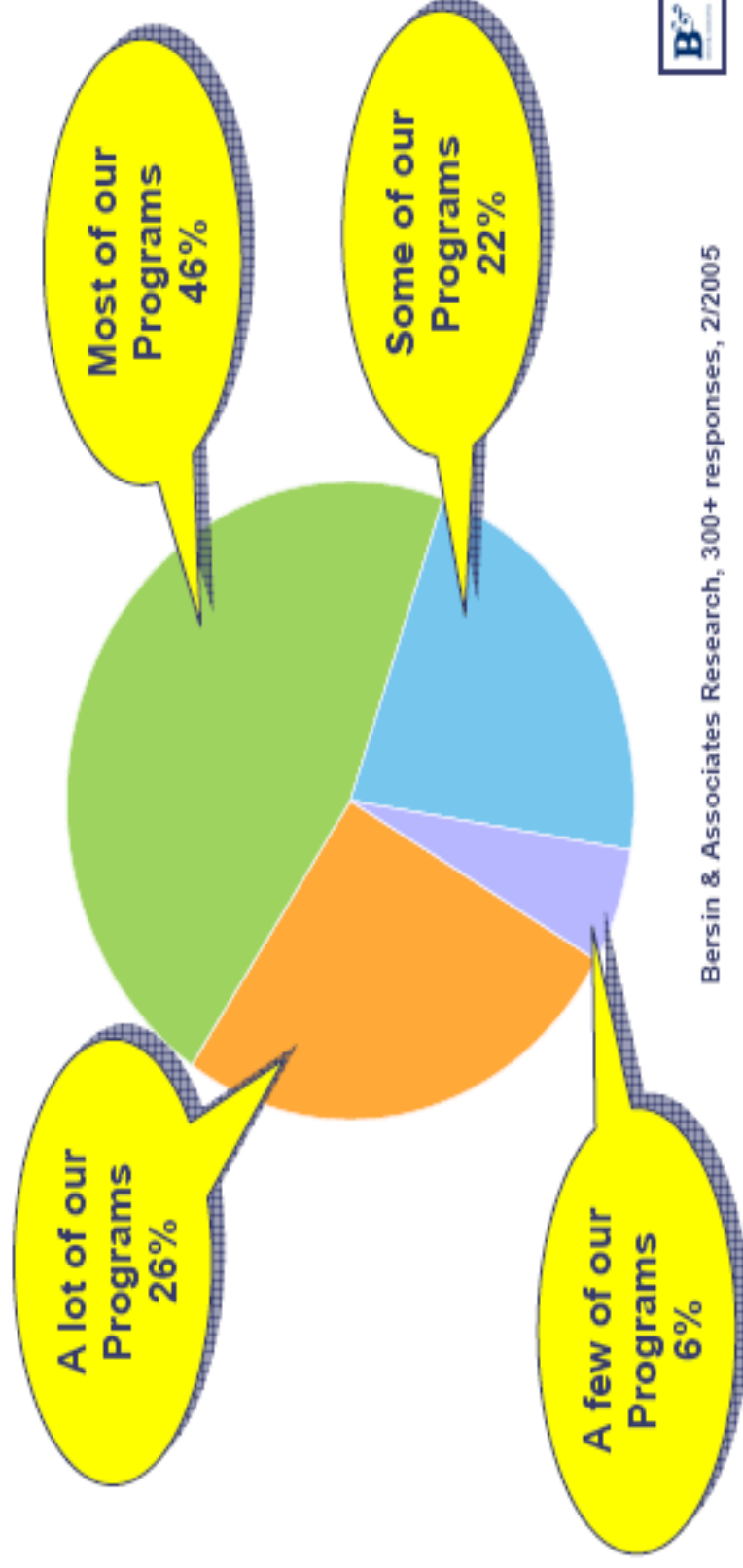
It is too hard to work with SME's.



Figure 4: Drivers for Rapid E-learning

The Rapid E-Learning Market

What Percentage of Your Programs are Time Critical (a few weeks)?



Bersin & Associates Research, 300+ responses, 2/2005



© Bersin & Associates

Figure 9: Demand for Rapid E-learning Programs

Enterprise Learning 2006 – Josh Bersin (Dec 05)

- Rapid e-learning started in 2003 when the goal was to develop time-critical and informational content quickly using SME's
- The first stage used PPT to Flash conversion tools (Macromedia Breeze, Articulate and others).
- This has now evolved in three directions:
 - **Rapid simulations**, using tools such as Captivate and Camtasia, mixing simulation activities with PPT-based programs (but these tools are not ready for soft skills)
 - **Collaborative Rapid E-learning**, with a graphic designer or template designer to edit a program built by an SME
 - **Video-based Solutions**: with bandwidth and standard video players available in most companies, it is possible to distribute a “talking head” program without upsetting the IT department (key management updates, operational training programs and important company announcements are now using video in a rapid e-learning process).

Prediction: In 2006, most organizations with any e-learning initiative will be evaluating and using rapid e-learning tools and rapid e-learning approaches. Microsoft Vista will offer new rapid e-learning features that will make this approach even more popular with subject matter experts.