



Report on embedding e-learning in large companies

Acknowledgements

The researchers and Ufi/**learndirect** would like to thank all of those who contributed their time to this project.

This includes all of those opinion leaders who commented on the initial business model, contributed their knowledge about the e-learning market and gave permission for their comments to be quoted. They are named in the report.

It also includes all of the respondents who gave up their time to participate in the survey.

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Introduction and Signposting

This paper reports on in-depth, primary research amongst 503 large companies, looking at the ingredients that make e-learning successful. Section 1 gives an overview of the report and summarises the main findings relating to e-learning.

Section 2 describes the methodology used. Read this if you want to know how the research was conducted. Read 2.4 to find out how the information may be used by organisations to enhance e-learning.

Section 3 describes the data and the results obtained. Section 3.2 introduces the concept of segmentation and Appendix C describes the characteristics of companies in the different segments. The appendix contains a summary of the action plans that organisations may adopt to improve the probability of embedding e-learning. Read Sections 3.2 and 3.3 in order to understand the theory behind the implementation model. Section 3.4 describes the features of the segments and Sections 3.5 and 3.6 some of the differences between segments. It may be more constructive to read this if you know which segment your company occupies following use of the web-based discriminator tool, see [www//ufi.com](http://www.ufi.com) Appendix C should be read in conjunction with these sections. This appendix also suggests some of the action areas for companies that will improve the probability of successfully embedding e-learning.

Sections 3.7 to 3.9 contains the results of the general data about e-learning, including who was surveyed, drivers, benefits, successes, comments on return on investment, challenges, barriers, preferred locations for e-learning, attitudes concerning the future of e-learning, perceived industry leaders and suppliers used or under consideration. Read these sections to discover the nature of the e-learning market place.

Section 4 describes the business model used, the four key areas that relate to e-learning and a brief explanation of how the model is used to prioritise actions. Read this to understand the model.

Section 5 describes the tools available from **learndirect** and the methodology behind their design. Read this to understand better how the research can help you embed e-learning.

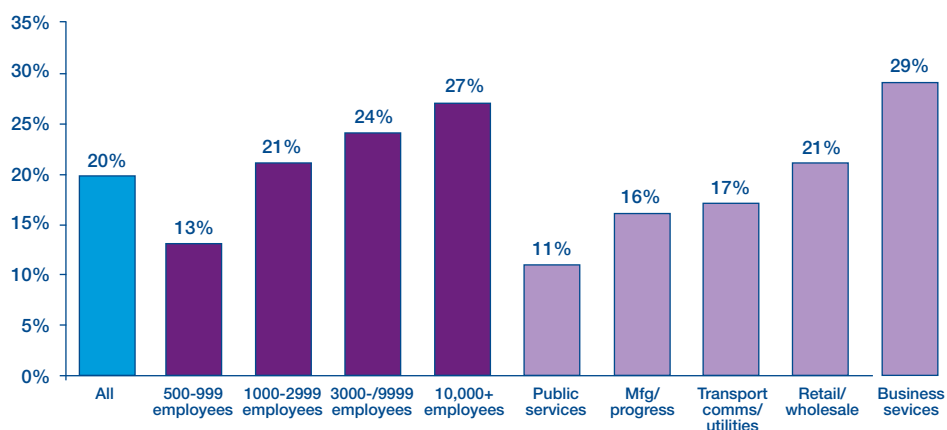
1. Purpose of the Report

This report identifies some of the methods and techniques used by companies who are successful at embedding e-learning. The survey on which this report is based has collected data from 503 large companies, all of which are using e-learning or actively planning to do so in the near future. The study classifies six types of organisations which share similar behaviour characteristics in management practices related to embedding e-learning, while the methods and techniques that are associated with successful e-learning are also identified. The report describes a discriminator tool which can be used by organisations to identify their characteristic type and the methods and techniques most useful for them in increasing the probability of successfully implementing e-learning.

The study was carried out by HI Europe, a global full-service market research company and was commissioned by **learndirect** at a time when there is evidence that the use of e-learning by organisations is increasing. Various surveys indicate that an increasing proportion of companies are using e-learning.¹ A survey of 100 companies, reported in July 2001, gave a figure of 19% of companies using e-learning. A survey of 1,000 organisations, reported in March 2002, gave a figure of 30% using on-line training.² A survey conducted by the CIPD for their 2003 survey into training and development reported that 48% of respondents were using e-learning.³ The survey completed at the end of 2003 by HI Europe on behalf of **learndirect** shows that 69% of large companies, employing 500 or more employees, are using or planning to use e-learning. For those companies employing more than 10,000 staff, 63% are using e-learning, with 32% of smaller companies (500-999 employees) using e-learning. As with the introduction of new technologies, it is no surprise to find that a greater proportion of larger companies are embarking on the use of e-learning. Likewise, 27% of larger companies (10,000 plus employees) perceive themselves to be successful at embedding e-learning, as against 13% of the smallest companies surveyed (500-999 employees). Figure 1 shows the spread of these results by company size as well as by industry sector/business activity.

Figure 1

% of users considering e-learning to be well-embedded (rating themselves 7 or above on a scale of 1-10)



¹ *Personnel Today* 25/07/01 Survey by Executive Business Channel

² *Personnel Today* 19/03/02. Survey by the Open University's corporate arm COROUS

³ *New trends in Training* CIPD 2003.

The definition of embedding was derived from in-depth face-to-face interviews with companies who use e-learning. These companies considered e-learning to be embedded when the following conditions are met: “It becomes an integral part of our learning options”; “It needs to be the equal of other forms of learning”; “People are not buzzed up about it. It is just there.”; “When certain standard processes within the organisation are delivered through the means of technology.”; “It’s there, it’s sustainable, people use it, it’s accessible and it helps improve their capability and the performance that they deliver.” Based on comments like these and others, the definition for embedding that was adopted for the large-scale survey is: e-learning is part of the company culture, has transformed some business processes and is just as likely to be considered when there is a learning requirement as any other training methods. Using this definition, respondents were asked to rate their perception of the extent to which e-learning is embedded in their company.

As well as providing a single assessment for overall embedding within their company, respondents were asked to rate their companies on 36 separate variables relating to e-learning implementation (see Appendix A). Statistical analysis links these individual variables to overall embedding of e-learning and enables actions to be developed that can enhance a company’s score on the variables most closely linked with embedding.

Further analysis of the 36 self-scored statements in Appendix A shows:

- they may be grouped in eight dimensions;
- companies can be grouped into six segments;
- actions appropriate to companies in each segment will increase the probability of embedding e-learning.

By assessing how a company scores on the 36 statements, companies can understand in which organisational type, or which segment, their behaviour places them. This is the purpose of the discriminator tool available from **learndirect** and is the first part of a four-stage consultancy process outlined below.

1. Assess where the company is today in relation to having an environment which predisposes to successful e-learning, using data collected from 503 other companies engaged in using or planning to use e-learning.
2. Compare the company with other organisations with similar characteristic behaviour.
3. Derive action plans associated with successful embedding. The action plans derive from the statistical analysis of the responses from 503 companies which identified certain actions that are associated with successful e-learning.
4. Implement the action plans and then re-assess.

2. Approach to the Research

The project covers three phases:

- designing the self-scored questionnaire, using inputs from secondary research interviews with industry opinion leaders and feedback from a small sample of e-learning users;
- identifying the organisations which are users and planners of e-learning, interviewing them and analysing the results using factor analysis and other statistical techniques;
- developing the segmentation model, the discriminator tool and action plans appropriate to organisations within segments.

2.1 Designing the questionnaire

The first phase used a consensus-based iterative approach. Desk research was completed, leading to the creation of an initial business model. Ideas were drawn from management theory, organisational and design theory and press comments on the implementation of e-learning, as well as ideas from e-learning professionals. Press comments included comments on the business drivers of e-learning, the oft-quoted benefit of flexibility and accessibility (any time, any place and perhaps, by implication, anyone), the benefit of linkages to other internal departments, the capability of trainers and of the training function. Repeatedly, there was comment on the leadership, management, strategy and culture that are essential to the successful implementation of e-learning. Appendix G lists some of the quotations extracted from this research. Management theory frequently discusses the multi-faceted nature of implementing change. Just one example from the research is the formulation of J R Galbraith⁴. Galbraith describes five variables in organisational design policy: structure, information technology, task, reward systems and people. Each of these inter-relates and provides a theoretical structure for managing organisations through change. Similarly Marc J Rosenberg⁵ describes a number of variables that had to be managed for the successful implementation of e-learning. In a readiness questionnaire that he has developed, he lists seven variables: business readiness, personal commitment, the role of change management, re-invention of the training function, the value of instruction and information, the changing nature of learning and the e-learning industry.⁶

The desk research indicates a number of factors, grouped into a few areas of management, that will, if managed appropriately, lead to the successful embedding of e-learning. This list of factors was reviewed with a number of industry opinion leaders, either people very knowledgeable about e-learning, with a wide range of experience across the industry, or those who are successfully implementing it inside organisations. Those consulted included: Diana Laurillard (DfES), Martin Sloman (CIPD), Neil Offley (NHS Leadership Centre), Mick Holbrook (DWP), Ann Lindsey/James Binks (CBI), Marion McKechnie (COROUS) and James Saunby (Advantage West Midlands). With each interview the list of factors was modified and adjusted. The list was reviewed by a small group of those who are implementing e-learning inside organisations. An in-depth interview was completed with six e-learning managers in six organisations. Following their feedback the statements were refined and modified, in some cases to make them more understandable and in other cases to change their meaning. The number of questions was also reviewed, to ensure the interview process would be respondent-friendly – 36 statements were therefore included in the questionnaire.

⁴ *Organisational Design* 1977

⁵ *E-learning: strategies for delivering knowledge in the digital age*, 2001. Published by McGraw Hill.

⁶ Paraphrased http://books.mcgraw-hill.com/training/elearning/eLearning_Survey.pdf

Additional questions were added to the 36 statements. These are a mixture of demographic and opinion-based questions. They relate to the respondents' view of the future of e-learning, both in general and specifically for their company; current information about their company – such as training budget, methods used for training, preferred location for e-learning delivery, key challenges, significant successes and major benefits of e-learning. In addition, there are questions relating to HR and training strategy more generally. The survey also considered the competitive landscape for e-learning, looking at suppliers being used and under consideration as well as gauging opinion of best-practice user organisations. The full questionnaire can be found in Appendix F. Companies were contacted by telephone and screened to ensure they employed more than 500 individuals UK-wide and were users or active planners of e-learning. The questionnaire took approximately 20 minutes to complete and includes 72 questions.

2.2 Analysing the data

The data collected can be considered as being of two types.

A. The demographic, factual and opinion-based data.

This is analysed using standard statistical techniques. The analysis is presented in a number of graphs and charts in this paper. See Section 3.4.

B. The 36 statements together with the perception of embedding.

Factor analysis is employed on the statements and the perception of embedding score. The 36 factors create 36 variables and factor analysis is used to identify relationships between these variables. 'Principal components regression' is a data reduction tool that identifies underlying themes and explains the patterns observed within a set of attributes. A fuller explanation can be found at Appendix D. This regression technique enables the 36 factors to be reduced to fewer dimensions and gives us some insight into how the respondents think about the different e-learning elements. Applying this tool revealed that the 36 variables could be reduced to eight dimensions. These dimensions are analysed in relation to respondents' perception of overall embedding, using regression analysis. This gives an indication of the strength of impact each one of these dimensions has on respondents' perception of overall embedding.

The study found that four of the eight dimensions have a statistical relationship to perceptions of embedding of e-learning. These four dimensions contain 18 of the 36 variables measured in the survey. It is likely that there are just as many variables not measured in this survey that will impact on overall embedding of e-learning; in time, as e-learning becomes more widely used within organisations, some of these unknowns may become clear. This research, however, has identified 18 variables that have an impact on the extent to which e-learning is embedded within organisations and actions associated with these dimensions that will increase the likelihood of a company successfully embedding e-learning.

2.3 Segmentation

The next stage of the analysis is to analyse behaviour characteristics in the companies surveyed, in order to segment the companies into separate groups which behave similarly in relation to the 36 variables. It is likely that companies in the same segment would benefit from similar action plans to improve the take-up of e-learning.

Predictive segmentation, a proprietary technique of HI Europe, is an advanced analytical approach that combines needs and characteristics to arrive at ultimate segments that are distinct from each other, yet internally homogeneous. By knowing what each segment comprises, in terms of its demographic characteristics and its behaviour in accordance with the 36 variables, it is possible to focus on both the needs of the segment, its most likely goals, and the best means by which it could start on a road to embedding e-learning. Taking this analysis further, discriminant modelling is a process that enables a relatively small number of drivers, which must account for the differences between the segments, to be identified. Segment membership can therefore be accurately predicted based upon a limited amount of known information; in this case, self assessment on only ten out of the total 36 statement variables can determine likely segment membership with an accuracy of over 83%.

2.4 Discriminator tool and action plans

A discriminator tool is developed in two versions, a CD-ROM using all 36 variables and a web-based freely available discriminator using ten variables (accessible at www.ufi.com).

Action plans are derived which will improve the rating for each one of the 18 statements that has an impact on the perception of embedding. The two versions of the tool generate action plans differently. For the web-based tool, the actions are based on the segment to which the specific company is likely to belong and prioritises actions in the average weakest areas for that segment. The CD-ROM tool uses the segment information and compares the ranking for the company rated with the tool against other companies in the same segment. The process is explained in Section 5.2 using a practical example.

3. Data obtained

The data collected from the survey may be grouped into:

- demographic information on company characteristics;
- opinions on e-learning successes, barriers and potential futures;
- participants' rating of the relative success of their organisation in achieving the management activities and procedures outlined in the 36 statements considered to be related to e-learning. Each respondent was asked to self-rate the extent to which they agreed that the statement reflected the situation within their organisation today.

3.1 Analysis of the self-rating response to the 36 statements

Factor analysis enabled the self-rating scores of 36 variables to be reduced to eight dimensions. Appendix B lists these dimensions, together with their associated statements. These dimensions are defined and labelled to reflect the kinds of variables contained therein. Appendix D describes the analysis methods used, in a little more detail.

3.2 Segment behaviour

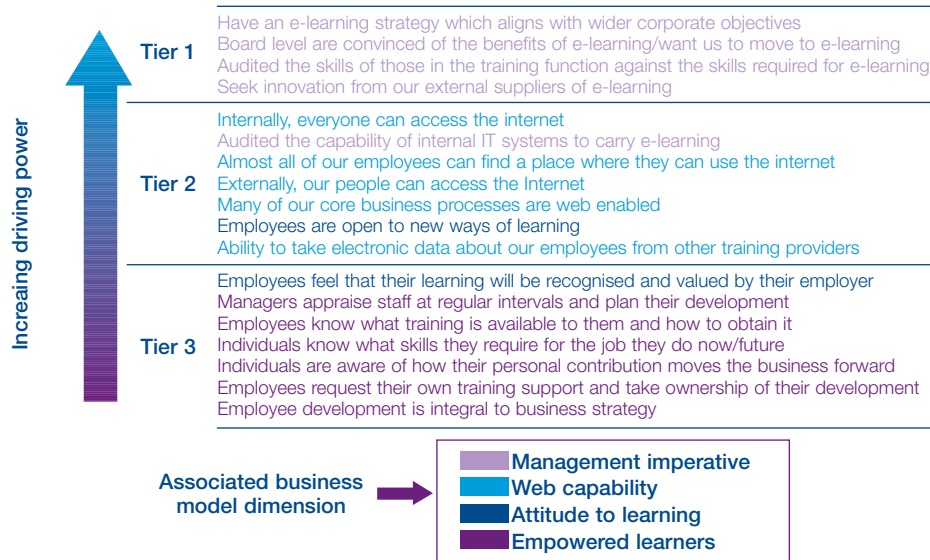
Companies were classified into the segments on the basis of an analysis of the 36 self-rated statements. Segmentation is based upon company behaviour and not underlying demographic or sector structure issues. It is clear that companies from all sectors and all sizes are represented in the various segments. Therefore, if a company changes its behaviour, even though it remains the same size and in the same sector, it will change segments and have a greater or lesser probability of embedding e-learning successfully. The process of segmentation does not distinguish between users and planners. Companies exhibit similar behaviour within each segment, irrespective of whether they are users of e-learning or planning to use e-learning. The implication is that a company within, for example, the virtuous segment (referred to as lions) has all the characteristics to ensure that e-learning will be successful before they embark on implementing e-learning. See Appendix C for a full description of the segments.

3.3 Links between variables measured and embedding

Each variable was compared to the self-rating of perceived embedding within each organisation. Eighteen of the statements show a relationship, eighteen did not. The 18 variables which show a relationship are listed in Figure 2 in decreasing order of driving power in relation to the embedding score. That is, the first statement has the strongest link to a company's perception of how well e-learning is embedded. The statements fall into three tiers in relation to their driving power as shown in Figure 2.

Figure 2

Impact of individual statements on embedding of e-learning



These 18 statements reduce by factor analysis to four dimensions: Management Imperatives, Web Capability, Attitude to Learning and Empowered Learners. The five statements in Management Imperatives collectively have the greatest influence on the probability of e-learning being embedded. The five statements in the Web Capability dimension have, collectively, the second greatest influence on the probability of success with e-learning. The remainder, grouped into Attitude to Learning and Empowered Learners, do have an influence but not as great as for the other two dimensions.

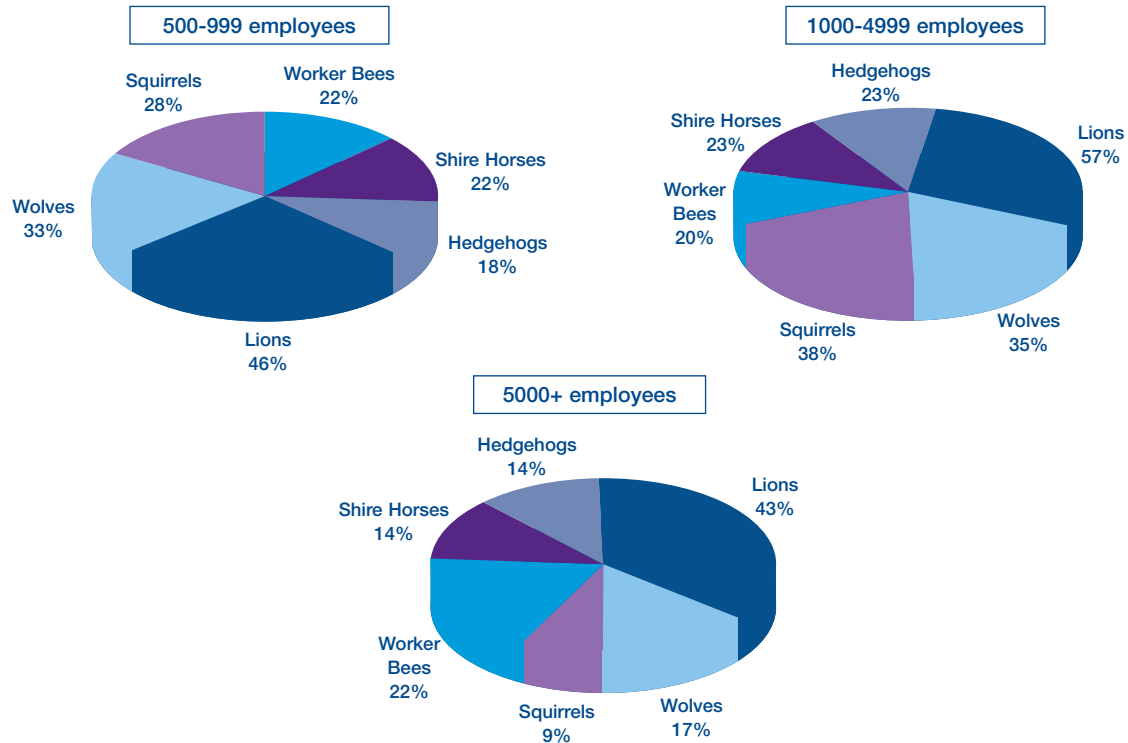
Organisations may take various actions to improve the probability of achieving higher ratings against any one of these 36 statements and in turn improve their probability of success with e-learning. This principle is at the heart of the action plans which are derived from the discriminator tool (see Section 5.2). The action plans recommended by the discriminator tool are chosen on the basis of the segment into which the company belongs. Companies are classified into a segment, based upon their self-rating on each one of the 36 statements. Segmentation is about the behaviour of a company rather than any innate characteristics of industry sector or company size.

3.4. Features of segments.

Certain demographic features are related to segment behaviour, but companies of all sizes and all sectors are fully represented in each segment. Figure 3 shows the distribution of companies within each size of company that fall into each of the six segments. This shows there is a reasonable probability of all company types (segments) being represented amongst companies of any size.

Figure 3

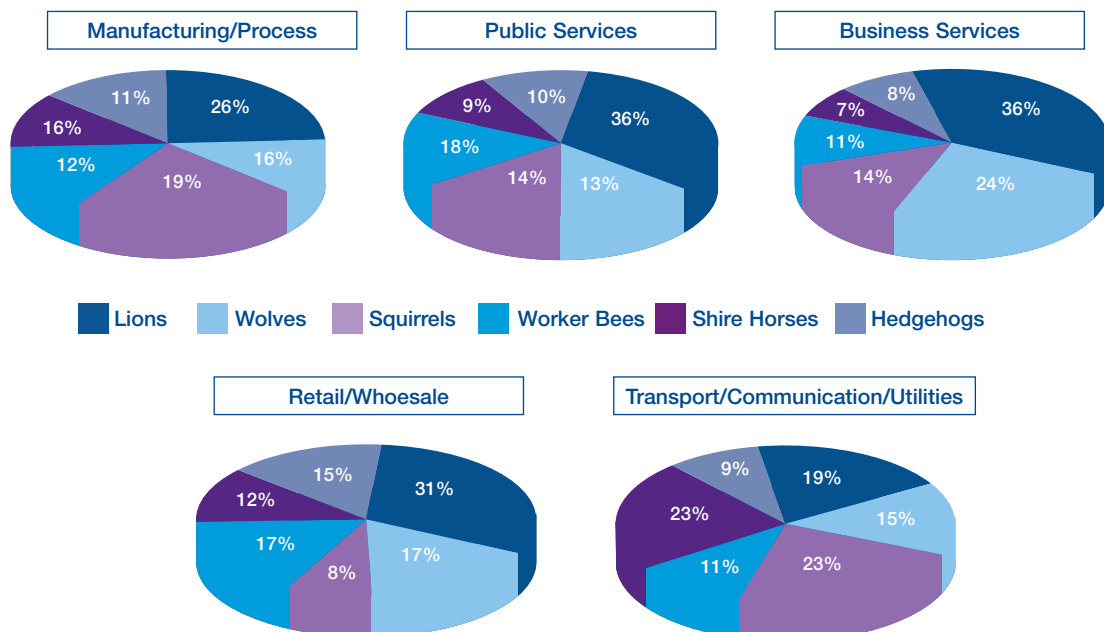
% of companies in size band that fall into each segment



Likewise, Figure 4 shows the distribution of companies falling into each segment within sectors.

Figure 4

% of companies in specific sectors that fall into each segment

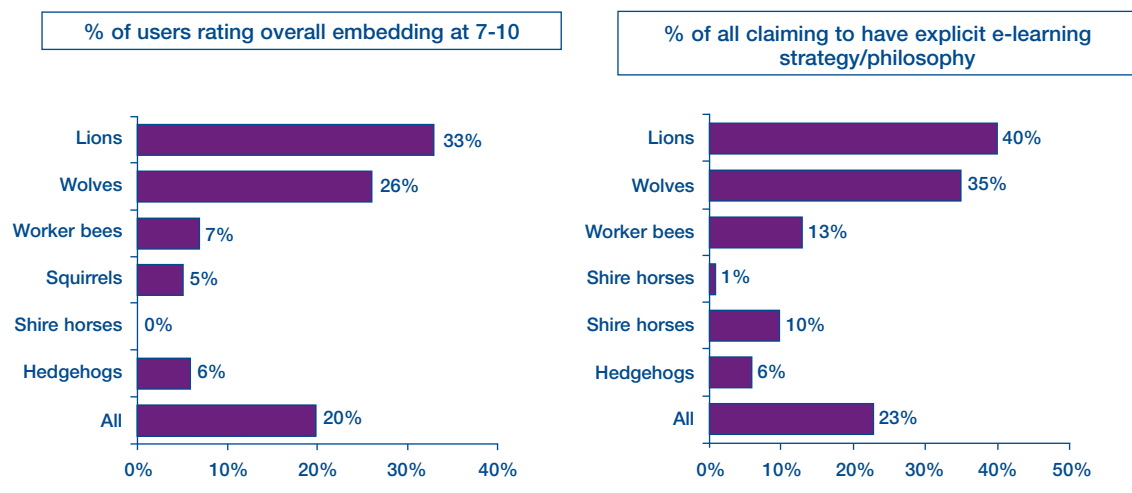


All segments are present to some extent within each industry sector, although some interesting variations do emerge. Virtuous companies (referred to as Lions) form a greater proportion of those within public and business services. Tenacious companies (referred to as Squirrels) are over-represented within the transport/communications/utilities sector.

There are other differences between the company types. Figure 5 shows the distribution by segment (that is company type) for the percentage claiming to have an explicit e-learning strategy or philosophy and those who rate their success at embedding at or above seven on a ten-point scale. Lions have a far greater probability of having a strategy and being successful at embedding e-learning. The analysis shows that the existence or otherwise of a strategy was the most significant driver of successfully embedding e-learning. The correlation between overall embedding and those that have an explicit e-learning strategy can clearly be seen in all company types except tenacious (Squirrels) and staunch companies (Shire Horses); see Figure 5. Squirrels are least likely to have an e-learning strategy but 5% of them perceive they have successfully embedded e-learning, whereas Shire Horses are more likely to have an e-learning strategy (10% claim to have one) but are least likely to perceive their e-learning as successful.

Figure 5

Segment comparisons on embedding and strategy



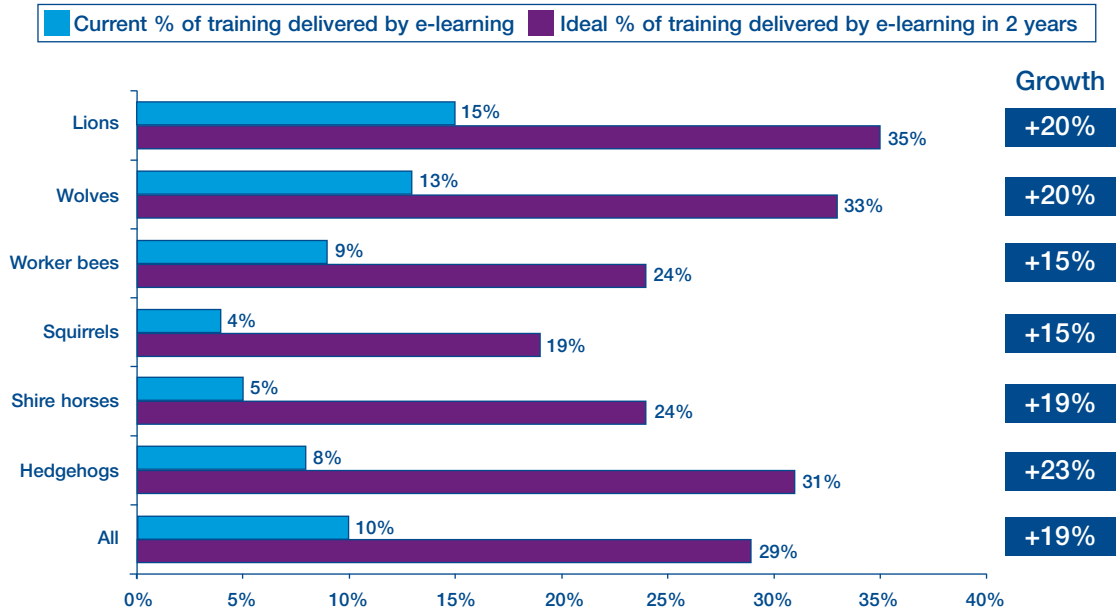
The interpretation is that tenacious (squirrels) companies may overrate themselves in relation to successfully embedding whilst staunch (shire horses) companies underrate themselves.

3.5 Predicted growth

Figure 6 shows the prediction made by companies within the various segments in their forecast for predicted growth in e-learning. All business segments believe that their use of e-learning will increase. Figure 6 shows the estimated proportion of the training mix accounted for by e-learning, both now and as predicted in two years time. The segments that are using e-learning the least now predict a five-fold increase, as compared with a 2.5 times increase for companies who are making more use of e-learning at the moment. Those who use e-learning least at the moment predict the greatest relative increase.

Figure 6

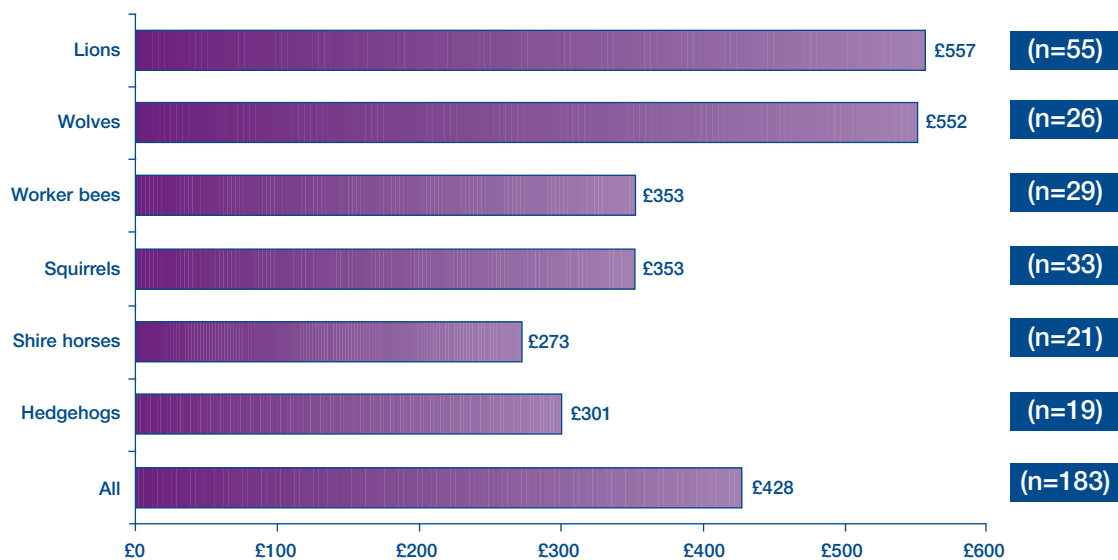
Predicted use of e-learning within training mix



3.6 Budgets

Figure 7

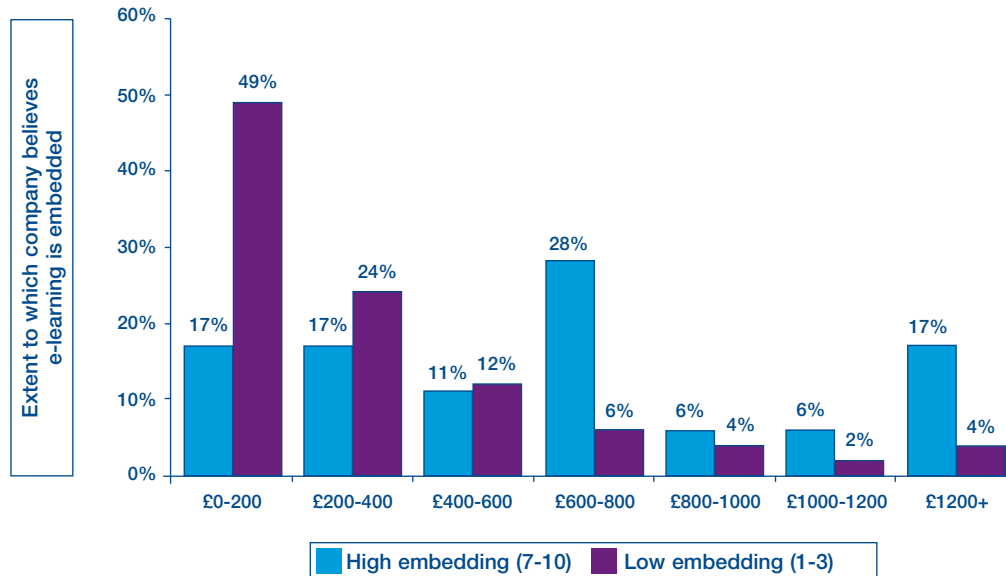
Average training budget per employee (£ per head)



Segments may be differentiated by budgets. Figure 7 shows the average expenditure per employee for companies falling within each one of the six segments. An implication from this is that greater spend equals greater probability of embedding. Segments that spend more do have a greater probability of embedding e-learning successfully but companies who do not spend more also succeed in successful embedding. A comparison between training budget spend per employee and perception of embedding gives a positive correlation of 0.32. Figure 8 compares the budgets of companies who are most successful in embedding e-learning and those who are least successful. This information combined with the partial correlation shows that there are ways to successfully embed e-learning without significant expenditure. Furthermore 26% of respondents claimed they were capable of delivering more with less by using e-learning (see Figure 12). A possible magic figure is delivering 25% of all learning via e-learning. Companies who deliver between 11-25% of their learning via e-learning have an average budget of £361. Figure 8 might support a supposition that not more than £800 per employee is needed since 28% of companies who successfully embed have a budget per employee between £600 and £800. However 44% of companies spend less. Increasing budgets does not of itself deliver embedding e-learning and the majority of companies who do achieve successful e-learning do so on budgets of less than £800 per employee for their total spend on training.

Figure 8

Budget per employee (relationship between spend and embedding)



3.7 Leaders in e-learning

Health Sector	Manufacturing
Gwent NHS Trust Worcester Hospital Trust Institute of Psychiatry Cardiff NHS Trust Ayrshire & Arran Primary Care South London & Maudsley NHS	Nissan* BAE Systems* Boeing* Nestle* Texaco Unipart Avon Rubber UK
Technology/Communications/Utilities	Finance, Insurance and Real Estate
Vodafone* Cisco* British Airways Microsoft BBC	Barclays* Prudential* Lloyds TSB Alliance and Leicester Norwich Union Goldman Sachs Royal Bank of Scotland Intelligent Finance AVIVA Aon AXA Insurance
Retail	
B&Q Sainsburys	

Respondents were asked which other companies in their business sector they regarded as leaders in embedding e-learning. The table lists the companies named by other companies as leaders in embedding e-learning (if starred the company was named by more than one respondent). The length of the list for each sector mainly reflects the fact that sectors are not equal users of e-learning. The technology and finance sectors are well-represented amongst early adopters of e-learning and, as such, would be expected to have more companies who had established best practice for their sector.

Many of these companies find themselves featured in the press, mentioned in articles about corporate universities (Lloyds TSB, BAE Systems, Unipart, Nestle, Royal Bank of Scotland⁷).

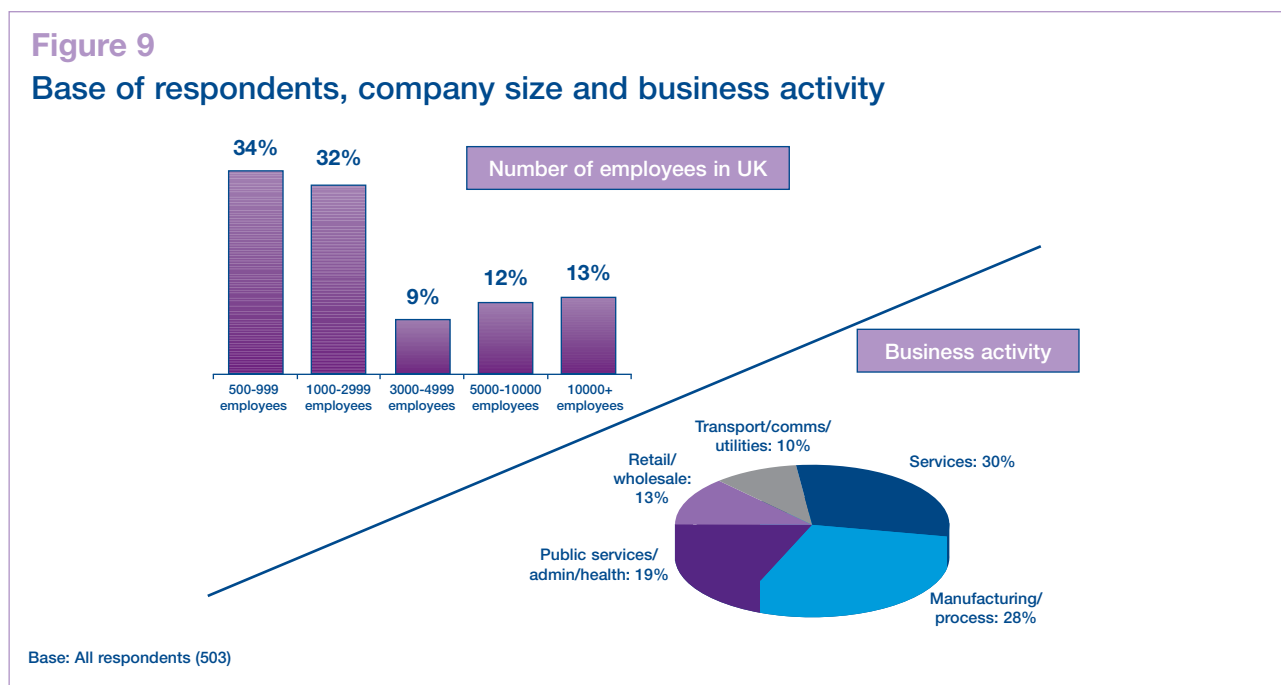
Companies also report increased customer satisfaction from employee learning (for example, B&Q). Reducing cost is also quoted. Royal Bank of Scotland and British Airways, for example, are usually associated with large numbers trained, a feature of e-learning also reported by many of the leaders.

The leader board also includes companies who report on successful outcomes such as savings and successful techniques for internal deployment.

⁷ Prometheus Network Newsletter July-August 2001

3.8 Opinions on e-learning

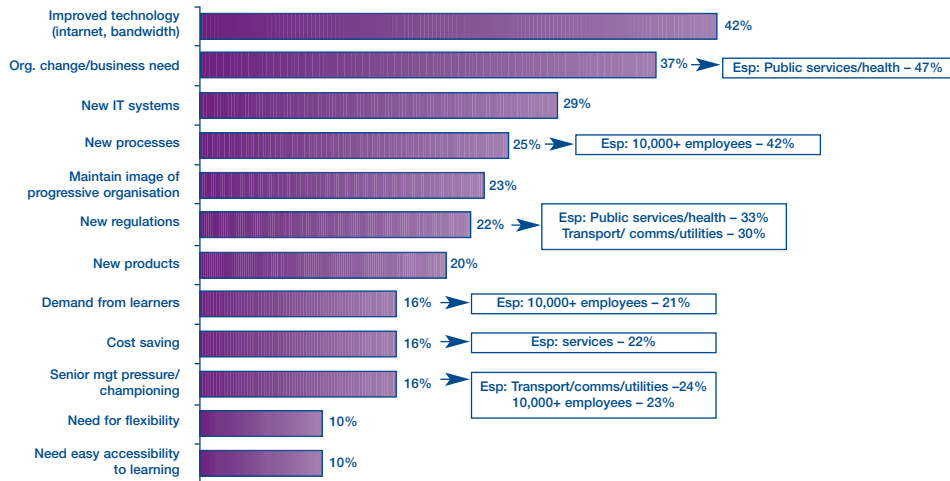
Respondents were asked a number of general questions about e-learning, including successes, benefits, opinions about the future, suppliers they work with and acknowledged leaders of best practice. The survey includes all sizes of companies employing more than 500 employees, across all business sectors. Respondents were represented in sufficient numbers to allow comparisons between sectors, although not in proportion to the companies found within the sectors. Figure 9 shows the distribution by business activity and also by number of employees. The data collected was sufficient for comparisons by size or by business activity.



Reasons for and benefits of e-learning

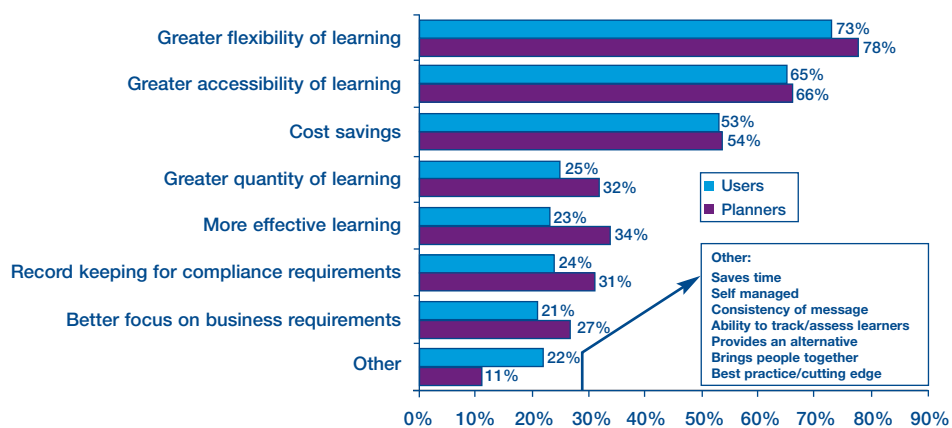
Respondents were asked to list the key drivers for adopting e-learning in their organisation. Figure 10 shows their responses. Leading the field is the desire to exploit new technology available within the company, with 42% of respondents citing this as a driver. Other business drivers, such as organisational change, new IT systems, new processes, new regulations and new products all figure prominently in the list. Interestingly, the desire to maintain the image of a progressive organisation is cited by 23% of respondents, more than those who felt cost saving to be an important driver (16%). The frequently quoted benefits of e-learning, those of flexibility and accessibility, are each cited only by 10% of respondents as a driver for adopting e-learning in the first place.

Figure 10
Key drivers for adopting e-learning



However, these last two drivers are considered to be the biggest benefits of e-learning by both those who use it and those who are actively planning to do so. Figure 11 lists the benefits cited by both users and planners. Flexibility and accessibility lead the list, with cost savings mentioned by half the respondents. Figure 11 shows that benefits perceived by planners are closely aligned with those considered as benefits by users, suggesting that market expectations are largely in line with what e-learning is actually delivering for companies. Minor differences emerge in that more planners than users consider that e-learning delivers a greater quantity of training, is more effective, enables a better focus on business requirements, and is useful for record keeping.

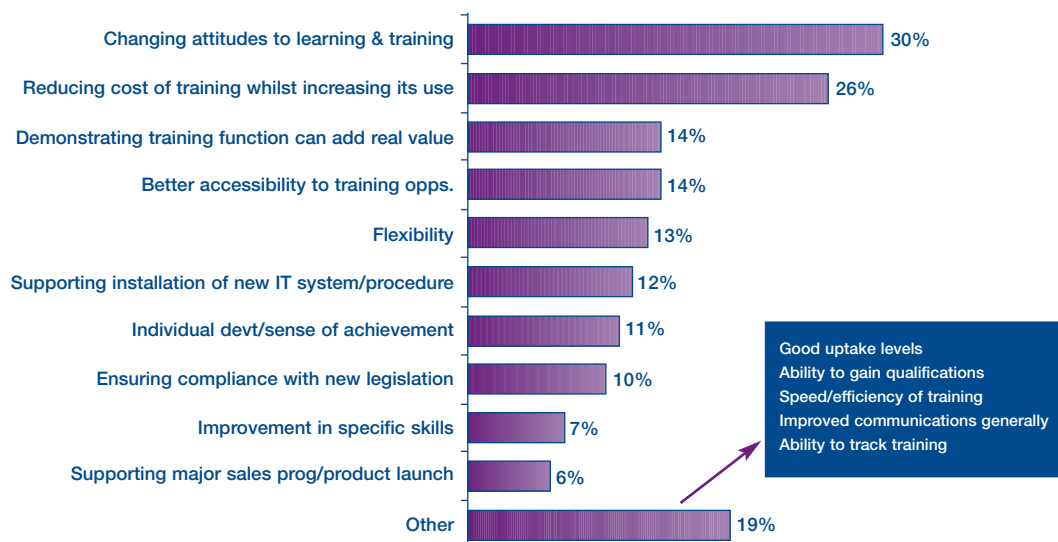
Figure 11
Biggest benefit to e-learning



Successes of e-learning

Companies were asked to state their main successes with e-learning and Figure 12 shows their responses. Similar themes emerge where successes are concerned as are seen in the analysis of benefits and drivers of e-learning, such as reducing cost, better accessibility, flexibility and supporting installation of new systems and procedures. However, other successes are also evident. 30% perceive a success in changing attitudes to learning and training and another 14% in demonstrating that the training function can add real value. Taken together these two indicate that when e-learning is successful, the perception within the organisation of both the training function and of learning itself is likely to change. The reasons for this change have not been investigated, but it is possible to hypothesise that the greater degree of control given to the individual changes individuals' perceptions of training and learning, because they exercise greater control and the training function is seen in a more supportive role.

Figure 12
Main successes with e-learning in organisations



Quantifying success

Respondents were asked if they had managed to quantify any of their e-learning successes. Methods of quantifying successes included the following:

- by counting the number of calls to our Help Desk;
- customer perception, labour turnover and attitude surveys;
- more people gaining IT qualifications;
- exam pass results;
- regular appraisals;
- people promoted after completing e-learning courses.

Some of the successes were related to the effectiveness and efficiency of the training function itself, for example:

- assessing all training six months later to see whether we need more training;
- ability to keep track of what is being used and how effective it is;
- database of all training completed, recording how well people did;
- using on-line system to see how e-learning is being used;
- collecting statistics and feedback on attendance;
- number of applications, number of modules undertaken and personal successes;
- report on usage and monitoring of employee progression.

Companies were also asked to state ways in which they had proved a return on investment (ROI) with e-learning. Whilst there were very few quantified comments, there were a number of qualitative comments.

- we prove its value to do with performance improvement and behaviour – we train on a specific product and we see sales of that product go up. The other measure of success is ownership – when it becomes an integral business process;
- we will need to say how e-learning has saved money for us;
- we have saved travel costs, as the training is now available on-site at any time and employees do not have to travel to head office;
- people spend less time away from work;
- e-learning is 30% more effective and efficient than other forms of learning. What used to take 10 hours away from work can now be achieved in seven hours;
- our large distributed workforce can now get the learning they need quickly, almost simultaneously with each other and each product is used by many hundreds of people at no extra cost to us other than the time spent by the learner.

Examples of proving ROI may be grouped in four areas.

1. Reduced or eliminated travel costs.
2. Saving staff time away from work (e-learning takes less time to study – figures quoted vary from 70% to 50% of traditional study times).
3. Volume training means that development costs are spread over a large number of students and delivery costs per student are very low. In many cases, learners who would not have benefited from other forms of learning because of cost are able to access e-learning.
4. Companies with fewer users for specialist applications are forming consortia.

Savings

Matthew Starks at Prudential can achieve cost savings in the time that learners spend away from the workforce. What used to take 10 hours away from work is possible to achieve in seven hours: *“E-learning is 30% more effective and efficient than other forms of learning”*. Prudential also saves money with economies of scale: *“Our large geographically dispersed workforce can now get the learning they need quickly, with hundreds of individuals able to access the learning materials at the same time. This can be achieved at no extra cost to us, once we have developed the product, other than the time spent by the learner.”*

Establishing consortia to gain economies of scale is a way of saving cost and delivering more learning. For example Lynne Blake of Unipres said: *“We were able to train people in CAD and design through co-operation with other local companies. Clubbing together in this way meant we got hold of training at a very much reduced cost and, of course, more people can use it. We have also been able to access e-learning through a neighbouring company's open learning centre and we now save money by doing all our basic computer training through **learnirect**.”*

Kelly Services saves time and money in implementing new processes and technology. Maria Gove of Kelly explained, *“We use a combination of telephone conferences and Placeware, a web conferencing system. Learners log on and phone in at a pre-arranged time. Everyone can hear everyone else and see the same material. We have many locations and this is the simplest way of getting a message to everyone. We save travel costs and the trainers spend very little more time preparing for a virtual session than they would for a classroom session.”* Maria went on to say that cancellations were slightly more frequent than with classroom sessions but that rescheduling a learner into a repeat session is simpler.

The Carphone Warehouse on the other hand linked e-learning benefit to improved service and sales. Simon Nicholas explains: *“The value of training is measured against performance improvement and behaviour. Specific product training should always lead to improved service and therefore an increase in sales.”*

Remploy found that they could do more training with computers and the cost effectiveness was supported by interest from the workforce because they could see young people benefiting from e-learning. Gareth Parry of Remploy asked employees how they wanted to learn. *“We talked to the workforce and 80% to 90% of them said that they wanted to learn how to use a computer to be able to understand better what their children and grandchildren were doing. This made it a viable proposition as more could be done on computers, which made training more cost effective.”*

Challenges and barriers to e-learning

Companies identified the barriers and main challenges in implementing e-learning. There were noticeable differences between those planning to use e-learning and those actually using e-learning. Figure 13 lists the main challenges for planners and Figure 14 lists the main challenges for users. Forty-two percent of users believe that the main challenge for their organisation has been overcoming user objections and achieving the right cultural change for e-learning to be successful. This is significantly more than for planners, where only 27% perceived this to be a challenge, suggesting that planners underestimate the cultural challenge of implementing e-learning.

In contrast, planners' perceptions of problems of technical infrastructure align with those of users, suggesting that most planners have a realistic appreciation of the technical challenges

that will face them. Funding issues, both proving ROI and funding the cost of development, are considered a challenge by more planners than users. Perhaps this is not surprising since, once e-learning is implemented, the issues of proving the business case and funding the development becomes less of a hurdle. Whether this is because the existence of e-learning makes it easier to prove the benefit, or because budget holders are less concerned about money that has been spent than about money that is to be spent, is a moot point. For the majority of the other challenges perceived by both users and planners, there is reasonable agreement between them as to their relative priorities.

Figure 13
Main challenges for planners

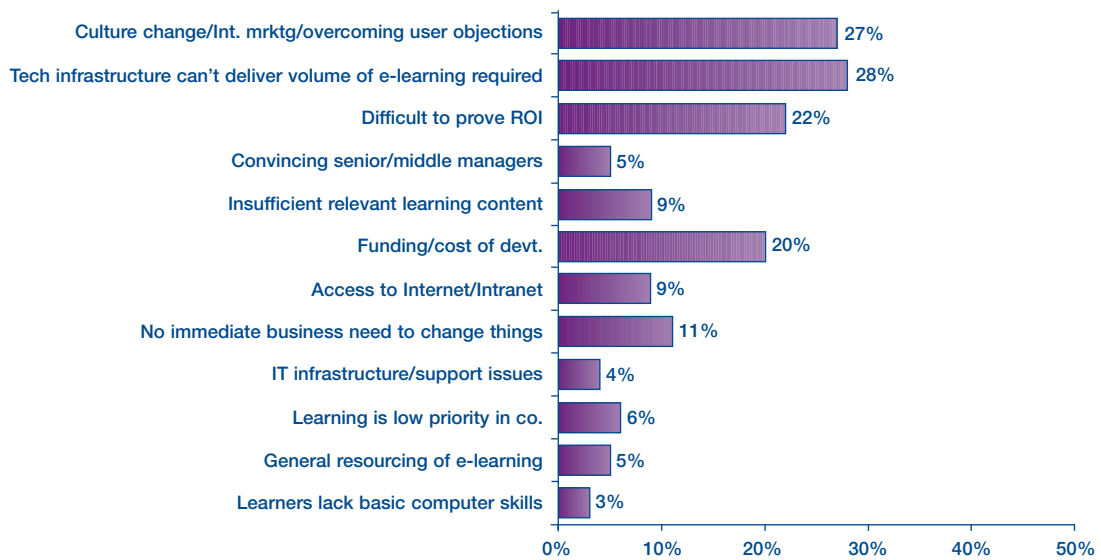
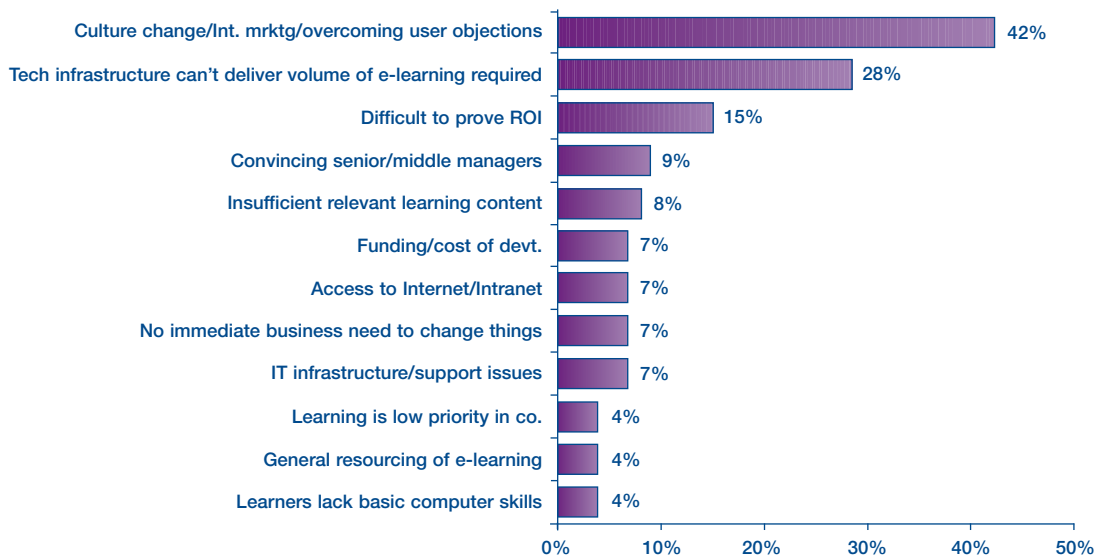


Figure 14
Main challenges for users



Location associated with successful embedding

Location may have some minor impact on the probability of companies successfully embedding e-learning. Figure 15 shows the locations deemed most appropriate for e-learning amongst the companies surveyed. The study also looked at the locations from which e-learning is currently delivered by e-learning users and analysed these locations against perceptions of embedding. This is shown in Figure 16. It seems that those companies that prefer to deliver e-learning at employees' desks may have greater difficulty in embedding e-learning successfully, although differences are marginal.

Figure 15
Most appropriate e-learning delivery location

Thinking about possible locations for delivering e-learning to your employees, please rank the following four options in terms of their appropriateness to your organisation's learning requirements. Chart shows those ranked first

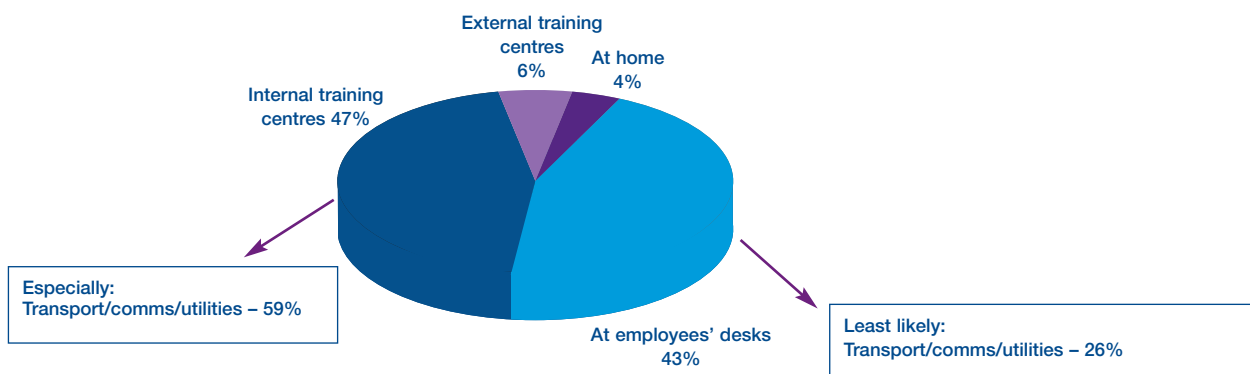
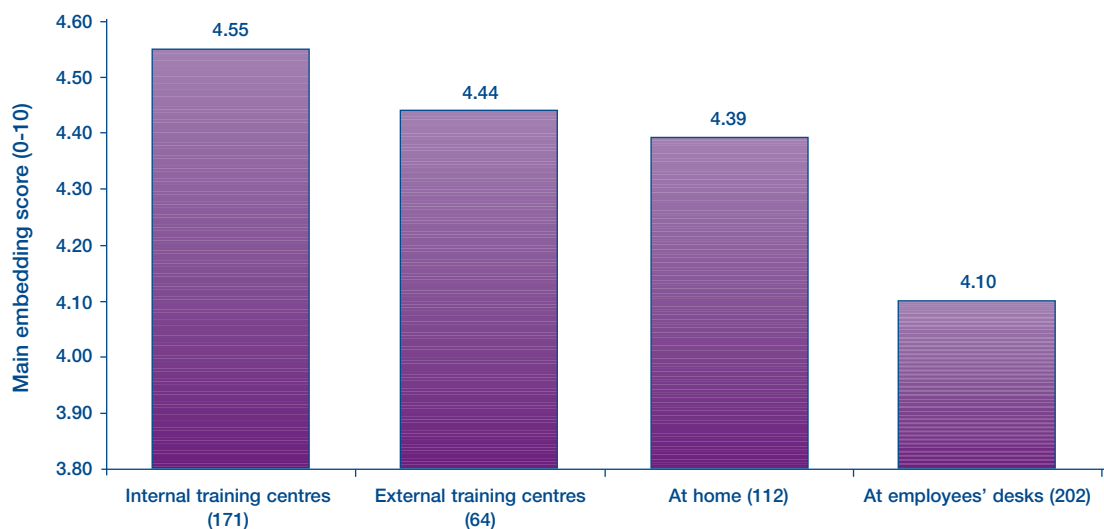


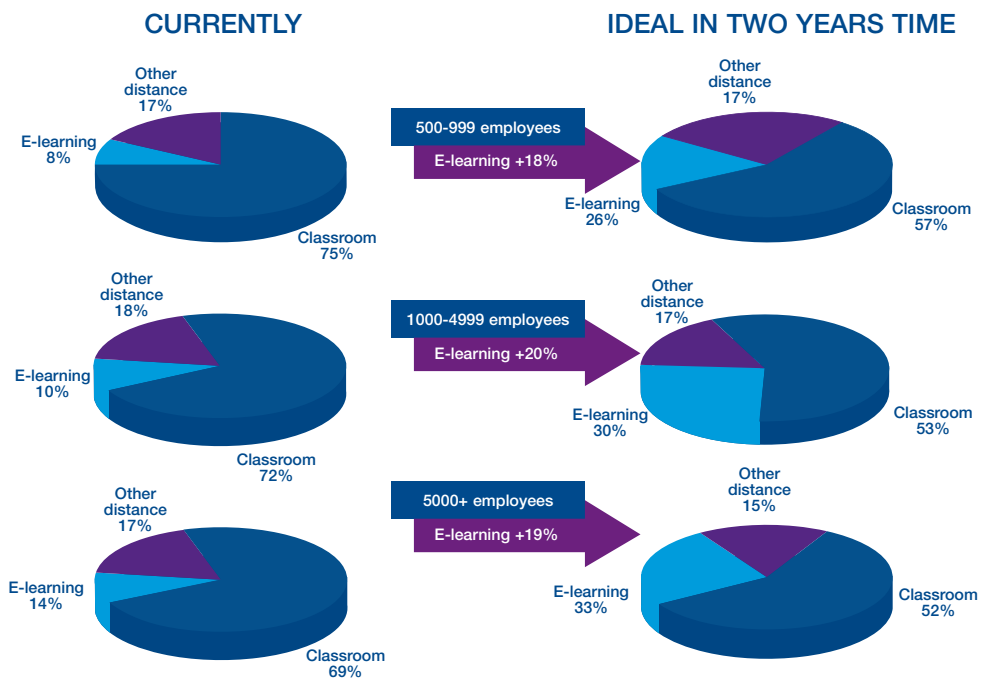
Figure 16
Impact of location of delivery on embedding



Future predictions

Attitudes regarding the future of e-learning seem to be quite optimistic, with the majority of respondents predicting future growth. Figure 17 shows the proportion of the training mix accounted for by different training types estimated by respondents both now and in two years' time. As reported previously, these estimates show some variation by segment.

Figure 17
Split in learning types – currently and in two years time



Respondents were equally positive that their employees would largely embrace e-learning in the long-term. Figure 18 shows the likely responses of employees as expected by both users of e-learning and those planning its implementation. In both cases, 40% of learners are expected to embrace e-learning in the long-term. More planners than users believe that learners will be sceptical and fewer users than planners expect outright resistance from their employees. It is, however, slightly disturbing to note that 20% of users expect initial excitement to be followed by disenchantment. This percentage is greater than that for planners; perhaps e-learning disappoints some employees. Whether this is because expectations are raised beyond realistic levels or through genuine dissatisfaction is not clear.

Figure 18

Current/expected response of employees to e-learning

Which of the following best describes the current/expected response of your employees to e-learning?

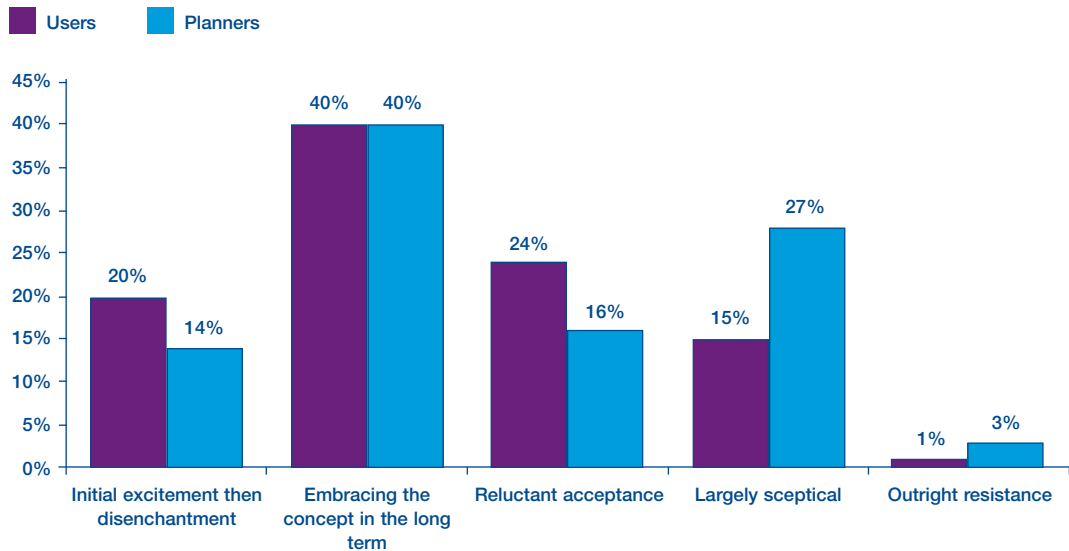


Figure 19 gives some indication of respondents’ perceptions of the likely state of e-learning within organisations in three years’ time. E-learning is expected to exist as a wider offering, supported by training records available certainly to employers and in some cases to employees. Sixty percent of respondents consider that employees will regard access to e-learning as part of the support and benefits they receive from the employer.

Figure 19

Vision of e-learning in three years time

% agreeing with statement (rating 4 or 5 on a scale of 1 to 5)

The organisations will have electronic access to the training records of every employee	77%
E-learning will be part of a wider offering to employees	76%
Employees will regard access to the e-learning they want as part of the support and benefits they receive from the employer	60%
All employees will have learning records they can access and an electronic learning plan	58%
All employees will access e-learning at times and places that they prefer	55%
We will only be using e-learning for a few specialist applications	35%
Our use of e-learning will not increase from where it is at the moment	14%
E-learning will be the first method of trianing that people think of	14%
E-learning will replace traditional methods of corporate training like classroom training	12%

3.9 Choice of suppliers

Both users and planners of e-learning were asked which suppliers they either use or are considering using. The following table lists their responses. The external suppliers who are most frequently considered are those who have available generic content. Noticeably, one-quarter of users provide all their e-learning internally. Amongst planners, one-third intend to provide e-learning without outside assistance. The difference in the intention of planners to create their own material and the proportion of users who do so may indicate that organisations find this less attractive as an option once they are using e-learning. An alternative view is that, as companies perceive greater benefit in e-learning and want to use more, they may request external assistance to provide the volume needed to meet demand.

Name of e-learning supplier	Percent of current e-learning users who use supplier	Percent of those planning e-learning considering supplier
No use (or consideration) of e-learning suppliers (e-learning supplied internally)	25%	34%
learndirect	20%	27%
NetG	17%	10%
KnowledgePool	7%	14%
SkillSoft	5%	12%
Smartforce	3%	6%
Ivy Learning	3%	4%
Spring	1%	5%
Apex interactive	1%	4%
Bourne Training	1%	3%
Creative Learning Media	3%	<1%
Elearnity	<1%	4%
Epic	<1%	4%
AdVal Group	<1%	4%
Echelon learning	<1%	4%
ACT	<1%	3%
EQL	<1%	3%
Video Arts	1%	<1%
Reach Online	1%	<1%
Skill Boosters	1%	<1%
Microsoft	1%	<1%
Wide Learning	1%	<1%
Cardinus	1%	<1%

4. The Business Model

The analysis of the 36 statements resulted in eight dimensions, each of which included a range of management activities that behaved in a statistically similar fashion and therefore represents how the market actually thinks about and groups different e-learning elements together. Eighteen of these statements, in four of the dimensions, influence the probability of successfully embedding e-learning. These statements are listed below in the order in which they influenced the probability of success.

Management imperatives

All the statements in the management imperative dimension are significantly related to embedding e-learning. They are also amongst the lowest scoring statements in the self-ranking exercise. For example, when asked to rate the extent to which organisations have an e-learning strategy aligned with wider corporate objectives, the average self-rating is 3.6 (on a 0-10 scale). This is also the statement within this dimension which is most related to successful e-learning. In other words, the single most important management activity in relation to embedding e-learning is the one that is perceived to be least well-achieved by the organisations interviewed. The remainder of the statements within this dimension and the average scores are as follows:

Statement	Average self-rating score (0-10)
E-learning strategy which aligns with corporate objectives	3.6
Board convinced of benefits/want to move to e-learning	4.2
Audited skills of training function compared to those needed for e-learning	4.1
Seek innovation from e-learning suppliers	5.6
Audited capability of ICIT systems to carry e-learning	5.7

Taking action in these areas is probably the most useful thing that organisations can do to improve the probability of e-learning being successful. However, some organisations may not yet be in a position where they can take some of these actions or where these actions are the most beneficial ones to take. The purpose of the segmentation model is to provide more focused guidance and an action plan that is appropriate to the current behaviour of the organisation.

Web capability

The dimension that has the second greatest influence is web capability. This is a significant differentiator between the segments, as well as having a significant impact on the probability of successfully embedding e-learning. The statements that cluster together to define this segment are as follows:

Statement	Average self-rating score (0-10)
Internally everyone can access the Internet	6.7
Almost all our employees can find a place to use the Internet	6.7
Externally our people can access the Intranet	5.1
Many core business processes are web enabled	5.3
We take electronic data from training providers about employees	3.8

Taking action in these areas may well be effective for a company although other actions may take priority. Although this dimension is titled ‘web capability’ some of these actions do not necessarily require significant IT spend. They do, however, have significant implications for IT policy and may impact on employment policy. For example, providing external access for employees to the company Intranet may imply an expectation that they will access the training material from home. Whilst some companies and employees may find this acceptable, others may find it unacceptable. The analysis shows that companies who are more likely to rate these statements highly are also more likely to be successful in embedding e-learning. Web-enabling core business processes is remote from the accountability of the training function. It may be that the training function can take action to build a business case with other support departments for web-enabling more operational functions. Depending on the company’s segment, that action may or may not be appropriate. The full discriminator tool will determine if that action is appropriate.

Empowered learners

This group of statements all contribute in some way to encouraging individuals to have responsibility for their own development. The title of this dimension may have specific meaning for the reader, but this definition is driven from the statistical analysis of the statements, rather than from any definition of empowerment. The phrase ‘empowered learners’ is used as a unifying title for the statements. The scores for these statements behave in a similar way across the organisations interviewed and are linked in some way to the perception of embedding within the organisation. This dimension is as influential as the attitude-to-learning dimension.

Statement	Score
Employees know what training is available and how to obtain it	7.4
Managers appraise staff at regular intervals to plan their development	7.7
Individuals know what skills they require now and in the future	7.1
Individuals are aware of how their personal contribution moves the business forward	6.7
Employees empowered to request training support for own development	6.9
Employee development is integral to business strategy	8.1

The self-rating for all these statements is significantly higher than that for management imperatives – which may, of course, go some way to explain why it has less influence on embedding e-learning. Since more organisations perceive themselves to be better at these actions, the difference between organisations is less. However, for some organisations in some segments, taking steps to improve performance in the ‘empowered learners’ dimension may be the first priority in terms of increasing the probability of embedding e-learning.

Attitude to learning

This dimension has some influence on successful embedding, as much as the previous dimension, empowered learners had.

Statement	Score
Employees open to new ways of learning	6.4
Employees feel learning will be recognised/valued by employer	6.7

This may be a dimension in which it is appropriate for an organisation to take action first, even if they lack a strong drive in the management imperative dimension.

Four key dimensions

The conclusion from the research is that taking action to improve a rating in these key dimensions increases the probability of e-learning success. The statements vary in their objectivity and also in the difficulty or ease with which organisations can improve their score on a statement. A company’s ability to decide the most appropriate course of action rests on two aspects; into which segment the company’s profile best fits and its ranking for the four key dimensions within that segment.

Appendix C describes the segments and the actions that are most profitable for a company in each segment. Action plans for companies in any segment will depend upon their relative ranking in each dimension, in comparison to other companies in the same segment. As a ‘rule of thumb’ if any company is in the lower quartile of their segment for any one of the four key dimensions, then taking action to improve the rating of statements in that dimension will be the first priority. The CD-ROM tool produces action plans to this level of detail.

5. Using the Business Model

5.1 Classifying organisational behaviour

The discriminator tool developed as part of this study is available at two levels of detail. A free tool is available on www//ufi.com. Users of this tool answer 10 questions from the 36 statements listed in Appendix A (the full diagnostic tool contains all 36 questions). These are sufficient to classify an organisation into one of the six segments. A sample screen of this web-based tool is shown in Figure 22. Once having been classified by the tool, companies may compare their own company with the segment description. Does it feel right and appropriate?

If the description does not feel appropriate, then it may be worth reconsidering some of the self-ratings to see if the fit with another segment is more appropriate. The self-rating tool is based upon the perceptions of the individual that answers the questions. With a large company, several people might self-rate the questions, either using the tool for each individual or by averaging all their scores and then entering them in the tool. This will produce a more rigorous classification.

Figure 20

We have audited the capability of internal IT systems to carry e-learning	6
Almost all of our employees can find a place where they can use the Internet	6
Externally, our people can access the Intranet	6
Internally, everyone can access the Internet	5
Individuals are aware of how their personal contribution moves the business forward	4
We innovate in assessment approaches so as to match them to work practices	6
Managers are willing and able to make space for e-learning	7

Predicted Segment	Probability
“Wolves”	84.85%
“Lions”	5.8%
“Worker Bees”	5.99%
“Squirrels”	0.70%
“Shire Horses”	1.62%
“Hedgehogs”	0.98%

Agile, technically competent companies, with a good web capability

Companies within this segment tend to have a larger training budget than comparable sized companies. Bearing in mind that this segment contains companies of all sizes, they rarely rate themselves in the lower quartile of their industry sector as far as embedding e-learning is concerned. This segment sees the ability to better focus on business requirements as a key benefit of e-learning and are also likely to consider the cost-saving elements of e-learning. This segment scores relatively low on aspects relating to empowering employees to take responsibility for their development. Action plans for companies in this segment should focus on empowering their employees, making them aware of their personal contribution to the business, promoting new ways of learning and ensuring that employees receive recognition from the employer for achieving their learning targets

Companies rated themselves on a scale of 1 to 10.

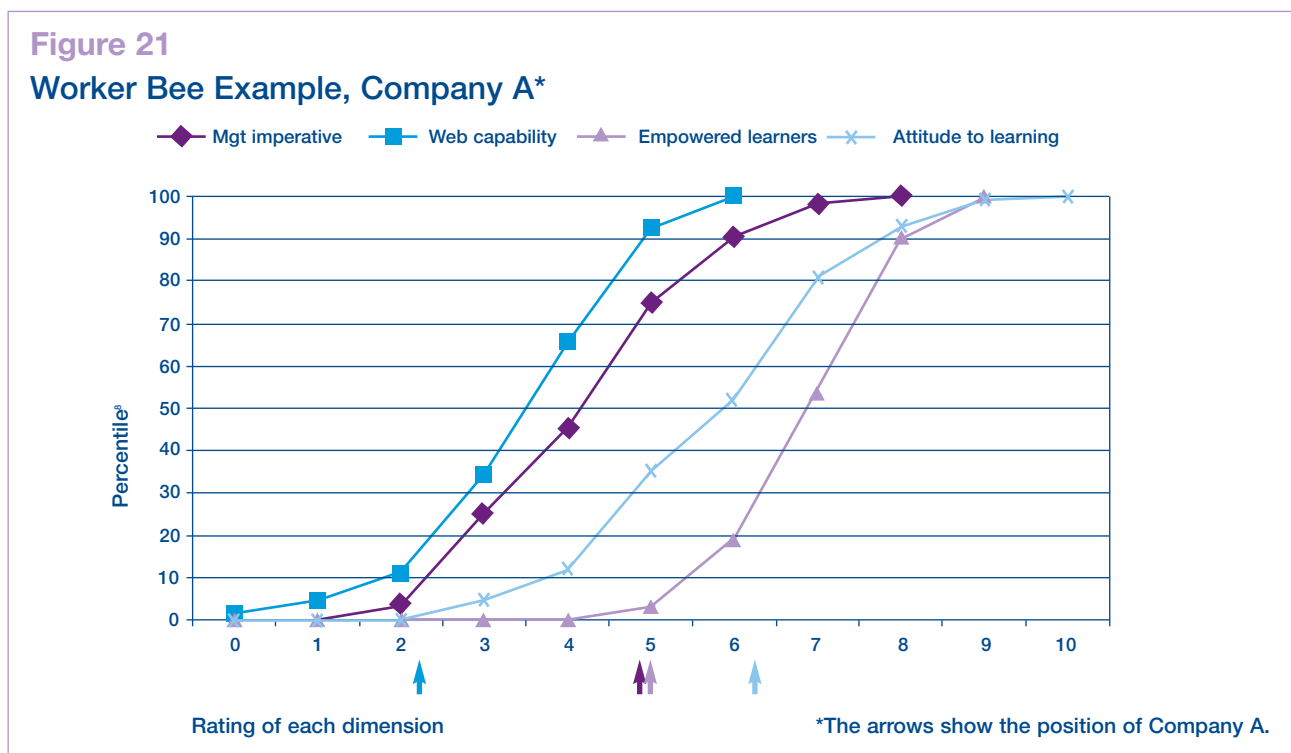
5.2 Generating action plans

The next stage of using the business model is to generate action plans. This feature forms part of the more detailed diagnostic tool.

Appendix E shows the scores of an actual company in the critical 18 variables (called Company A in the rest of this report). The discriminator model, based on these ratings, classifies the company as a Worker Bee. The diagrams and description in Appendix C3 indicate that Worker Bees are less developed in their web capability than the average of all companies. This is the generic area for action for companies in this segment.

More detailed analysis compares the ranking of Company A against other companies in the same segment. This is seen visually in the percentile curves in Figure 21⁸. The discriminator tool measures the ranking and, for any dimension rated in the lower quartile (i.e. at least 75% of companies in this segment rate themselves higher than Company A), generates priority actions to improve ratings for this dimension, taking account of any variables where action has already been taken.

Figure 21 shows the percentile curves for all Worker Bees and the ranking of Company A. Their lowest comparative ranking is for empowerment of learners and this is the priority action area. In fact, this company stated in the interview that “employees were responsible for their own development”. The result of the self-assessment shows that they ranked very low in comparison to other Worker Bees, in fact 95% of other diligent companies rated themselves above this company in the statements that collectively cover empowered learners. Company A can take action to turn this expressed aspiration into reality. The dimension of empowered learners is composed of six statements (as in Appendix B).



The final part of the evaluation and analysis process is to study the values of these self-rated questions in comparison to others in the segment. Those scoring lowest in comparison to other companies are the priority action areas. The more detailed diagnostic will use all the self-rating scores and produce a list of possible actions that can be taken by Company A in prioritised order. For example, it may be that a catalogue of courses is not available to every employee. This is one of the statements within the dimension of empowered learners. This may be the most appropriate first action for the company to take: providing access to a list of available training material for employees.

⁸ Percentile curves are cumulative percentages of all companies scoring a particular self-rating. In this example the management imperatives (red curve) approximately 3% of companies scored two or less, 25% of companies scored three or less, 45% scored four or less and so on. This gives a good visual indication of a company's ranking in comparison to other companies in the same segment.

5.3 Software available

The more detailed diagnostic carries out a three-stage check:

1. Which segment is the company in?
2. For which dimension does it rank lowest in comparison to the average for that segment?
3. For which variable in this dimension is the score lowest against averages for all companies within the segment?

The output is a list of actions based on:

- the segment the company is in;
- the ranking of each dimension within that segment;
- any variables where the company already rates above 7 being ignored.

The recommended actions are directed at the dimension in which the company ranks lowest compared to other companies in the same segment. It is envisaged that the use of the tool in a paid-for consultancy situation will lead to the action plans being modified, based upon real experience. There will be an increasing body of information based upon actions being taken by a wide range of companies who are implementing e-learning.

There will be a number of action areas and it is likely that feasibility studies will support the viability of each action. Cross-industry experience of these feasibility studies will grow with the use of the tool. Some actions might require external support and some might not. Taking action will result in a change in the scoring for particular variables. This will change the overall rating for a dimension, leading, probably over time, to a change in segment. Segments are about company behaviour, not business activity or company size. Whilst it is true that there are certain characteristics of each segment which relate to budget per employee and some influence from company size, it is clearly possible for companies to change segments as their behaviour changes.

The shorter web-based tool, available on www//ufi.com, omits the last two stages of the analysis and generates a list of possible actions for any company in a particular segment. Users may then use their own evaluation and analysis process to prioritise the actions suggested.

6. Comment

This study is in-depth, detailed and quantified in relation to aspects of making e-learning successful in large companies. It sets out to simplify and structure what companies need to do to make e-learning successful. It has identified many management actions that were thought to relate to embedding e-learning but which do not. There are many variables relating to successful e-learning that it has not identified, but it has identified 18 variables which do link to successful implementation and, by classifying companies, give straightforward guidance to managers as to what they should do and how they should do it.

Appendix A – Self-rated Statements as Presented to Respondents

The 36 statements that were established from the desk research, opinion leader interviews and pilot group were presented to respondents in the following structure. For each statement listed, respondents were asked to what extent the statement reflected the situation in their company today. They were asked to use a scale of 0-10, where 0 meant that the statement did not reflect their situation at all and 10 meant that it fully reflected their company's situation today.

Business drivers

Links between the strategies of the training function, training activities and business goals and the extent to which these are measured.

- There are short-term business goals that training must support.
- We have a training budget which is not related to 'bums on seats' but to the basis of the business initiatives that it supports.
- Board level are convinced of the benefits of e-learning and they want us to move to e-learning.
- We have an e-learning strategy, which aligns with wider corporate objectives.
- We have a training budget that is agreed by business leaders at the same time as other support functions, such as IT and marketing and, in some cases, as part of the same projects.
- We continually modify our learning content to match our business objectives.

Training function capability

Readiness and willingness of those in the training function to embrace the changes needed, measured by their knowledge, skills, attitudes, processes and relationships with co-suppliers.

- We have good links/relationships with those responsible for knowledge management.
- We have the capability to manage external suppliers of e-learning content/services.
- We have audited the capability of internal IT systems to carry e-learning.
- We have good links/relationships with the IT department.
- Our internal training team is willing to embrace new ways of working with technology.
- We have audited the skills of those in the training function against the skills required for e-learning.
- We seek innovation from our external suppliers of e-learning.

Technology infrastructure

The capability of the in-house IT function to support and deliver e-learning whether the policy supports that move or not.

- Almost all our employees can find a place where they can use the Internet.
- Externally our people can access the Intranet.
- Many of our core business processes are web-enabled.
- Internally everyone can access the Internet.
- The IT department is fully supportive of developing e-learning capability.
- We can or do take electronic data about our employees from colleges and other training providers.

Capability of learners

Readiness and willingness of employees to engage in e-learning at or close to the workplace.

- Employees are open to new ways of learning.
- Employees feel that their learning will be recognised and valued by their employer.
- Employees are empowered to request their own training support and take ownership of their development.
- Employee development is integral to business strategy.
- Individuals are aware of how their personal contribution moves the business forward.

HR processes and measurement

The stated people-management practices and the extent to which they allow and encourage benefit to be extracted from learning.

- We need to assess and test employees and record the results for compliance purposes.
- Individuals know what skills they require for the job they do now and the job they might wish to do in the future.
- Managers appraise staff at regular intervals and plan their development.
- Employees know what training is available to them and how to obtain it.
- The HR department asks employees what they think of the learning support they get, including how well it matches their personal aspirations.
- We innovate in assessment approaches so as to match them to work practices.

Leadership and culture

The behaviour of leaders at every level in the organisation and the workforce's attitude to workplace learning.

- The company demonstrates commitment to personal development by initiatives such as liP.
- Managers coach their own teams.
- Managers make time for employees to learn: at home, locally, at work.
- Change management is an integral part of our deployment of learning.
- Employees help each other learn.
- Managers are willing and able to make space for e-learning.

Appendix B – Dimensions

Appendix B – Factors grouped into dimensions

This appendix shows all the management variables that have been measured by the survey, the 36 statements on which the original business model was based. This appendix groups them in accordance with the factor analysis results. That is, each group of variables behave in a similar fashion and can be expressed in the one dimension into which they are grouped. The titles of the dimensions are used as unifying statements to embrace the variables. It should not be assumed that the titles of the dimensions carry any more meaning than as unifying statements for the variables.

Management imperatives

- E-learning strategy which aligns with corporate objectives.
- Board convinced of benefits/want to move to e-learning.
- Audited skills of training function against those required for e-learning.
- Seek innovation from e-learning suppliers.
- Audited capability of IT systems to carry e-learning.

Web capability

- Internally everyone can access the Internet.
- Almost all employees can find place to use Internet.
- Externally our people can access the Intranet.
- Many core business processes are web-enabled.
- Take electronic data about employees from training providers.

Attitude to learning

- Employees open to new ways of learning.
- Employees feel learning will be recognised/valued by employer.

Empowered learners

- Employees know what training is available and how to obtain it.
- Managers appraise staff at regular intervals in order to plan their development.
- Individuals know what skills they require now and in the future.
- Individuals are aware of how their personal contribution moves the business forward.
- Employees are empowered to request training support.
- Employee development is integral to business strategy.

Organisational learning

- Change management is an integral part of our deployment of learning.
- Employees help each other learn.
- Managers coach their own teams.
- Managers make time for employees to learn: at home, locally, at work.
- Managers are willing and able to make space for e-learning.
- Employees are asked if learning support matches their aspirations.
- Assessment methods are innovated to match work practices.
- The company demonstrates commitment to personal development.

Internal co-ordination

- We have good links/relationships with the IT department.
- Our internal training team is willing to embrace new ways of working with technology.
- Our IT department is fully supportive of developing e-learning capability.
- We have good links/relationships with those responsible for knowledge management.
- We have the capability to manage external suppliers of e-learning content/services.

Training as a business

- We have a training budget that is not related to 'bums on seats' but to the basis of the business initiatives it supports.
- There are short-term business goals that training must support.
- We continually modify our learning content to match our business objectives.
- We have a training budget that is agreed by business leaders at the same time as other support functions.

Compliance

- We need to assess and test employees and record the results for compliance reasons.

Appendix C – Segment Descriptions

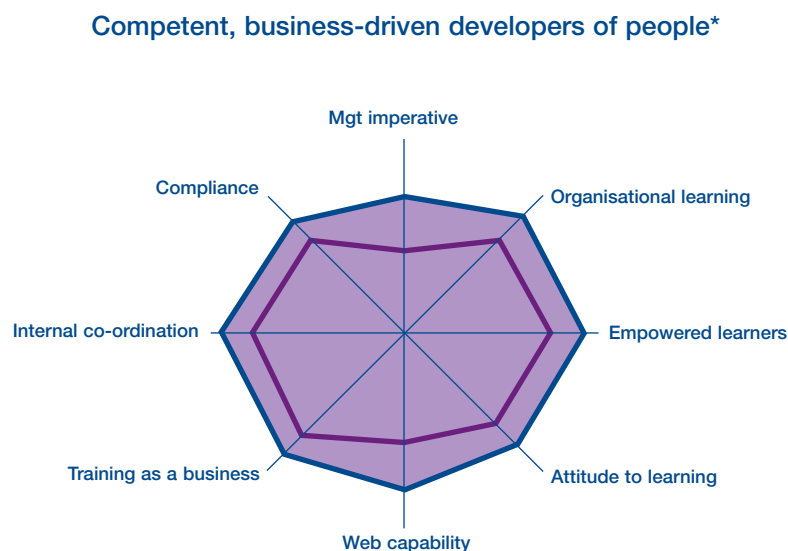
C1 – Virtuous companies (referred to as lions)

Virtuous companies are competent business-driven developers of people. Fewer than 10% of virtuous companies rate themselves at four or below for any of the dimensions⁹. The average budget-per-employee figure for all virtuous companies is larger than for all other segments except meritocratic companies. They are over-represented in business services, public services, finance and amongst larger companies. The main driver for the HR and training strategy is the need to gain competitive advantage. E-learning is driven by many factors, all of which will be more significant than those in other segments. Eighty-six percent of virtuous companies are looking to gain competitive advantage through a more skilled workforce, compared to 78% of all respondents. Virtuous companies have a broad view of e-learning and mention maintaining image and supporting new processes as drivers. Virtuous companies are more likely to have an e-learning strategy and see many benefits of e-learning. They are slightly less likely to perceive any difficulty in proving a return on investment and have a greater probability of being technically advanced in terms of bandwidth and the existence of a learning management system or content management system. They have a positive view of e-learning and have support throughout the organisation at board, line management and IT department level. There is an overall positive view of e-learning, with employees expected to embrace the concept in the long term. Figure C1 compares the self-rating for virtuous companies against the average for all companies.

Action plans in this segment are most likely to depend on the specific ratings for each one of the statements in the four critical dimensions. Those companies who do not have an e-learning strategy aligned to corporate objectives should create one. The skills within the existing training function should be compared to those needed for e-learning. Collecting evidence on the internal benefit of e-learning and presenting that to the Board is another area for action likely to be of significant benefit.

Figure C1

Lions



In Figures C1 to C6, where the shaded part of the diagram is smaller than the unshaded area, companies are doing less well than they could in this dimension. This is where they need to focus their action planning.

⁹ This rating, referred to as a self-rating, is calculated from the average of all the self-ratings of the statements that are grouped within the relevant dimension.

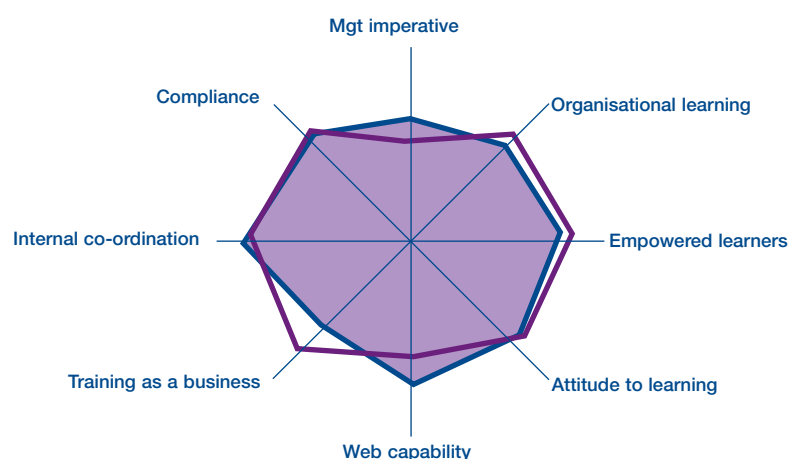
C2 – Meritocratic companies (referred to as wolves)

Meritocratic companies are agile, technically-competent companies with a good web capability. Companies in this segment have, on average, similar sized training budgets per employee compared with those in the virtuous segment. They are over-represented amongst smaller companies and the business services sector. Training budgets are less likely to be related to business initiatives than with virtuous companies and less likely to be in line with other support functions. Meritocratic companies focus on business requirements and consider the cost-saving elements of e-learning. They list more challenges relating to overcoming user objections than other segments. They are technically advanced in terms of bandwidth and content management system (CMS), and are more likely to have audited the capability of their IT systems to deliver e-learning. Employees within meritocratic companies seem less empowered, less aware of how their personal contribution moves the business forward and less open to new ways of learning. They seem to be companies where employee challenge is higher than employee support. They are less likely to modify e-learning content to match business objectives and show a stronger preference for e-learning to be delivered via internal training centres, even though they are more likely to have a capable IT infrastructure.

Action plans for companies in this segment should focus on increasing the empowerment of learners. Information about training should be made available to employees and systems put in place to enable them to request training support. Individuals may be made aware of how their personal contribution helps the business and employee development should be tied in to the business strategy. The regular appraisal processes should focus on development, as well as reward. Skills maps or competency frameworks should be made available to employees, so that they can map their own future development within the company. All these actions will improve the self-rating for the empowered learners' dimension.

Figure C2
Wolves

Agile, technically-competent meritocracies*



In Figures C1 to C6, where the shaded part of the diagram is smaller than the unshaded area, companies are doing less well than they could in this dimension. This is where they need to focus their action planning.

C3 – Diligent companies (referred to as worker bees)

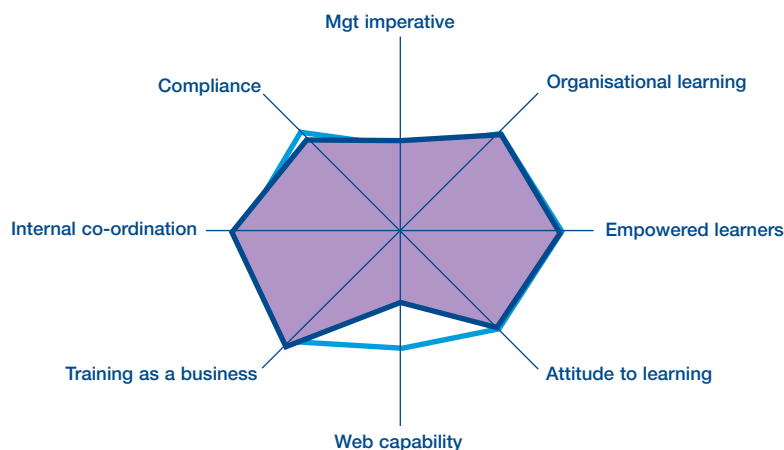
Diligent companies are substantive, people-orientated businesses with a technical challenge. The quality of the people they employ is more important than the technology available. Companies in this segment are over-represented in larger companies and in the public services and under-represented in the transport/communications/utilities sector. They are more likely to be larger companies with moderate training budgets¹⁰, although these budgets are likely to be agreed at the same time as other support functions. Their HR strategy is driven by the need for attracting and keeping staff, in line with their view that people are an integral part of their business. Diligent companies see e-learning as part of a wider offering to attract and retain employees. Overall investment in training is likely to be moderate. Employees have less access externally to the Intranet than the average opportunity across all companies. Cost savings are a key driver of adopting e-learning. Funding seems to be less of an issue than with other segments, although diligent companies experience more challenges relating to overcoming user objections than other segments. They indicate a stronger preference for delivering e-learning at employee desktops, despite their lower-than-average self-rating of the web capability dimension.

Action plans for companies in this segment should concentrate on providing access to e-learning, both within the workplace and outside it. It is likely that very few business processes will be web-enabled. Although companies express a greater preference for delivering e-learning at employee desktops, it is possible that Internet-connected open learning centres are likely to be the simplest way of improving self-rating scores for many of the questions in the web capability dimension. Providing training material on external Internet sites available to employees from these learning centres and from home would significantly improve accessibility. Initiating internal discussions on operational savings that can be made when internal support departments exploit web capability may enable a robust business case to be built for web-enabling more core business processes.

Figure C3

Worker bees

Substantive, people-orientated businesses with a technical challenge*



In Figures C1 to C6, where the shaded part of the diagram is smaller than the unshaded area, companies are doing less well than they could in this dimension. This is where they need to focus their action planning.

¹⁰ The average training budget per employee for the virtuous and meritocratic companies is significantly higher than for all the other segments. The other four segments have comparable training budgets per employee.

C4 – Tenacious companies (referred to as squirrels)

Tenacious companies have a willing workforce which is seeking strategic direction and they are least likely to have an e-learning strategy. The significant feature of tenacious companies is their low self-rating of the statements that comprise the management imperative dimension. They are over-represented in manufacturing and transport/communication/utilities sectors. On average, tenacious companies score higher on the web-capability dimension than the average for all companies. They perceive accessibility to be the key benefit of e-learning. Although such companies tend to have high levels of internal Internet access, they are limited by bandwidth or service space and are less likely to have a supportive IT department. Tenacious companies are rated above average for the empowerment of learners and employees in this segment are most likely to feel that their learning will be recognised by their employer. They have a narrow view of e-learning, intending to use it for a few specialist applications. Tenacious companies show the strongest preference for receiving e-learning at employees' desktops and are the most likely segment to face challenges concerning funding and development costs. E-learning is driven by business need and short-term organisational change. Training is a business, with budgets tied to the business initiatives they support. Their HR strategy is driven primarily by the ability to attract better staff and continuing to motivate them.

Action plans for this segment will need to concentrate on the area of management imperatives. The overriding need will be to establish a clear strategy aligned to corporate objectives. Following this, there is a need to audit the internal skills of the training function and also the capability of the internal IT systems to carry e-learning. It may also be beneficial to take some action in the empowered learners dimension, depending upon what actions have already been taken. Employees in tenacious companies have a good attitude to learning, what is significantly lacking is the long-term view of the future of e-learning as established by strategic guidance from the top of the organisation.

Figure C4
Squirrels



In Figures C1 to C6, where the shaded part of the diagram is smaller than the unshaded area, companies are doing less well than they could in this dimension. This is where they need to focus their action planning.

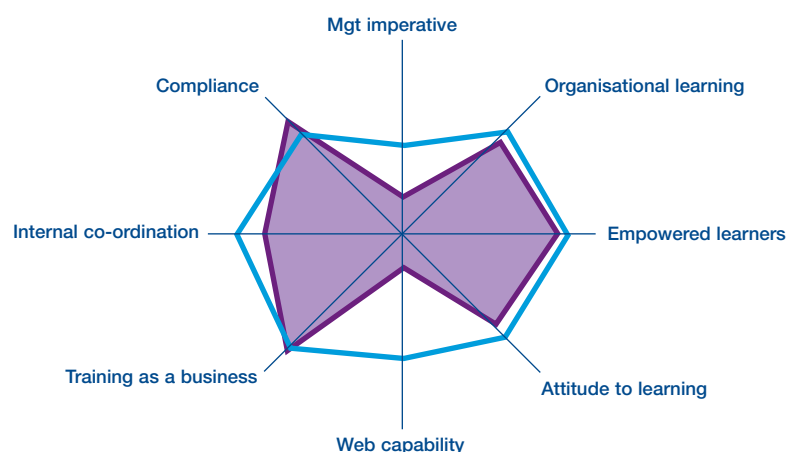
C5 – Staunch companies (referred to as shire horses)

Staunch companies have a co-operative workforce, with a technical challenge seeking strategic direction. They are slightly over-represented in the manufacturing, process and transport/communications/utilities sectors. They are least likely to be found in the business services and public services sector. Their HR strategy is primarily driven by legislation or compliance and keeping records for compliance reasons is seen as a key benefit of e-learning. Staunch companies tend to have the smallest average training budget per head, although employees have a good attitude to learning and their self-rating for empowered learners is on a par with several of the other segments. Their HR strategy is driven by a wish to keep staff motivated and to be seen as a progressive organisation. They continually modify training content to business objectives, although tending to lack an e-learning strategy. They have limited bandwidth or server space and they are least likely to have an LMS or CMS. Generally there are low levels of Internet access and staunch companies are unlikely to have a supportive IT department or to have audited their IT systems. They show a strong preference for e-learning to be delivered via internal training centres, which is appropriate in view of the low score in the web capability dimension. Staunch companies expect employees to be either sceptical or to reluctantly accept the use of e-learning.

Action plans for this segment have to focus on both management imperatives and web capability. Undoubtedly, in prioritised order, establishing a strategy and convincing the Board of the benefits of e-learning must be the priority actions. Establishing the costs of moving to e-learning by auditing the skills and capabilities of both the training function and the IT systems is the next step. Engaging other support functions in the web-enablement debate enables a critical look at the cost and operational savings to be considered, thereby strengthening the case for greater use of the web internally. Internet connected open learning centres may well be very effective, with an external hosted e-learning Internet site available, both from inside and outside the company.

Figure C5
Shire horses

Co-operative, with a technical challenge seeking strategic direction*



In Figures C1 to C6, where the shaded part of the diagram is smaller than the unshaded area, companies are doing less well than they could in this dimension. This is where they need to focus their action planning.

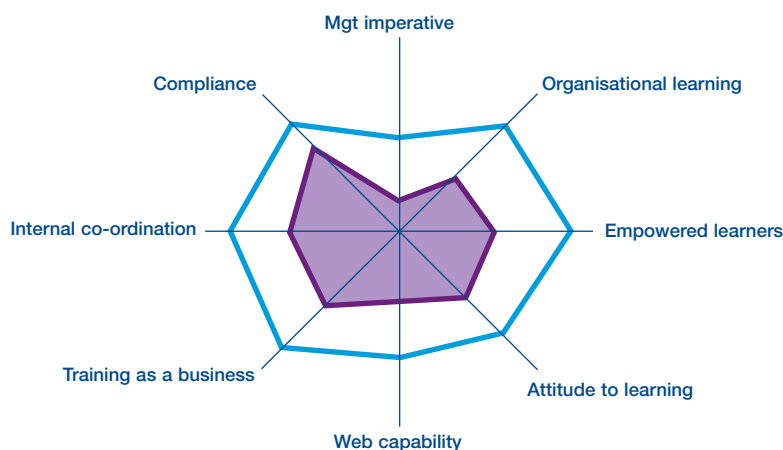
C6 – Assiduous companies (referred to as hedgehogs)

Assiduous companies are companies with traditional trainers, who have an appetite for solving their management and technical challenges. Assiduous companies score below average on all dimensions, except that their rating for compliance is close to that of the average for all companies. They may be perceived as companies driven more by compliance requirements for training than employee development. Assiduous companies are equally well represented in companies of all sizes, although slightly over-represented in the retail/wholesale sector. They are also less likely to have conducted training in all subjects in the last 12 months, particularly less likely with regard to general management and communication skills. Assiduous companies are unlikely to have an e-learning strategy aligned to corporate objectives and, in general, learning is perceived as a low priority. They cite the fewest benefits of e-learning and have a struggle to prove ROI. Employees are expected to be sceptical about e-learning and least likely to embrace it in the long term. Employees do not feel their learning is recognised. Web capability is well below average and they are unlikely to have an LMS or CMS. As with many segments, their self-rating for the management imperatives is lower than that of other dimensions and they are least likely to have an e-learning strategy.

Action plans for companies in these segments will have, in the long term, to address all the critical dimensions. It is likely that improving the scores for the management imperatives variables is likely to be the most appropriate initial action. Identifying the business benefits of e-learning, so that these can be articulated to the Board and top management is likely to prove most beneficial. However, companies in this segment also regard e-learning as a low priority. It may be that focusing on compliance benefits in terms of the initial e-learning strategy will produce the most sympathetic response from the Board. Given the strategic buy-in from top management, the next step is to establish a strategy, build a business case for improving web capability, putting in place recognition for learners and providing the flow of information to learners so that they feel empowered. Having an e-learning strategy that aligns to corporate objectives has the greatest impact on improving the probability of e-learning being successful. It is therefore the most appropriate starting point for assiduous companies.

Figure C6
Hedgehogs

Traditional trainers with an appetite for solving their management & technical challenges*



In Figures C1 to C6, where the shaded part of the diagram is smaller than the unshaded area, companies are doing less well than they could in this dimension. This is where they need to focus their action planning.

Appendix D – Description of Methodologies

Segmentation

The purpose of segmentation is to identify different groups with shared characteristics. In this study the groups identified were organisations sharing a specific set of management practices as measured through 36 statements relevant to the successful use of e-learning. The resulting 'cluster analysis' has been used to group organisations with apparently similar behavioural characteristics with regard to managing e-learning. This segmentation is independent from normal demographic segmentation based upon either size or business activity.

This approach to segmentation has enabled us to develop action plans tailored to each segment. It will also support the development of evaluation and consultancy services which can be tailored and offered to each segment in a way that precisely meets the needs of individual organisations.

Principal Component Regression (PCR)

PCR is a method of calculating the 'derived' importance of attributes in driving perceptions of performance or satisfaction at an overall level. It combines in an intelligent way two traditional statistical techniques 'principal components analysis' and 'regression analysis'.

Principal components analysis (which is a form of factor analysis) is a data reduction tool that identifies underlying themes ('factors') which explain the patterns observed within a set of attributes. The main purpose of factor analysis is to reduce the number of variables to manageable proportions and detect structure in the relationships between variables. In this case, there were 36 variables derived from the 36 statements respondents were asked to rate. Factor analysis allowed us to remove redundancy/duplication from the variables and represent the variables with a smaller set of 'derived' (more powerful and independent) variables, or 'dimensions'. The technique can be thought of as a distillation process in which the factor analysis identifies general 'cognitive dimensions' from the large numbers of original attributes. The factors typically identify 'constructs' which cannot be directly measured, for example management imperatives and management attitudes to individual and organisational learning. These 'evaluative factors' or 'constructs' are called 'dimensions'.

The next stage, regression analysis, considered these new dimensions and calculated the dependency between the scores on the dimensions and respondents' perceptions of the extent to which e-learning was embedded in their companies. In this process, movement on the dimensions 'explains' movement in the score for perceptions of embedding and it establishes the strength of the impact that each of the dimensions has on perceptions of embedding. In this analysis, the eight dimensions drive 32% of the variation in the overall embedding score as stated by respondents.

It is clear that there are a number of other variables, not measured in this survey, which will also have an impact on respondents' perception of embedding. It is also clear from the data collected that relatively few companies rate themselves highly in terms of their perceptions of embedding, which will reduce the sensitivity of the data. Embedding is therefore clearly far more complicated than a single survey can portray. We have only scratched the surface and considerably more analysis would be required to explain embedding completely. However, this may never be possible because more and more of the measures may become increasingly subjective. Indeed, respondents' perceptions of embedding are already subjective.

Nonetheless, we have succeeded in linking perceptions to a number of more objective statements and we are confident that our analysis represents a more detailed and scientific study of organisational behaviour in relation to embedding e-learning than any other to date.

Appendix E – Example of a Company’s Self-rating

Actual ratings from Company A*
(Only ratings in the 18 dimensions that drive the perceived embedding score)

Management imperatives	
Audit of IT	8
Seeking innovation	8
Audit training function skills	1
Board level are convinced of the benefits	6
E-learning strategy aligned to corporate objectives	3
Web capability	
Electronic data about employees is transferred from outside sources	2
Our core business processes are web-enabled	2
Externally our people can access the Intranet	1
Internally our people can access the Internet	7
Almost everyone can find a place where they can use the Internet	2
Attitude to learning	
Employees feel their learning is valued	4
Employees are open to new ways of learning	9
Empowered learners	
Employee development is integral to business strategy	9
Employees request their own training support	4
Individuals know how their contribution moves the business forward	3
Individuals know the skills they need now and in the future	5
Managers appraise staff	4
Employees know what is available and where to get it.	6

*Used to calculate the dimension scores shown in Figure 23 that provide the ranking for company A)

Appendix F – Extracts from the Desk Research*

Business drive matters

Why do it in the first place? The evidence from desk research supports the view that a strong business drive increases the chance of success.

The (Crown Prosecution Service) CPS training strategy is agreed each year through a production of an annual training plan which specifies priorities, targets and resources. Secondly, there is a need to achieve speed to market in training where new Government initiatives are introduced. ‘Speaking-up for Justice’ which is CPS’s first significant e-learning initiative, reflects the need to disseminate new legislation to a multiplicity of users in a tight time-scale.

Excerpts from an article by Martyn Sloman, People Management, September 2003.

A big driver for this scenario (engaging a whole strata of learners in e-learning) is regulatory compliance, and there’s already plenty of examples of how on-line learning or compliance can be quite effective – particularly in scale. Delivery via e-learning content and assessment, in conjunction with automated tracking can provide quite a compelling solution.

David Wilson, Training Journal, May 2003.

Many organisations make two errors when they initially get into e-learning. First, they equate e-learning solely with the use of technology, and second, they fail to focus on the genuine business reasons for doing it in the first place.

Marc Rosenberg, People Management, 3rd April 2003.

Solid business cases and short-term ROI will continue to influence buying decisions made by those both inside and outside the training department, says the firm (IDC) .

Reported in ASTD Learning Circuits, February 2003. The same article says that the IDC report predicts a worldwide e-learning market of \$23.7 billion in 2006.

At a strategic level, there is a new emphasis on aligning learning with the council’s business objectives. Ann Millington, Head of Organisation and Employee Development at Bexley Council, is reported as saying: “A few years ago we would offer courses and whoever turned up, that was it! It was about training department survival. Now, it is about what we have to do to help the organisation become better – it’s much more about organisational development.”

Personnel Today, 8th April 2003

DIY Retailer B&Q has done the opposite, over the past two years, not only has it doubled its training budget, it has also made a multi-million pound capital investment in a learning management system. B&Q has directly tied compensation for more than 25,000 staff to their ability to put their training into action.

Personnel Today, 8th April 2003.

*Observation by the author are in italics.

Any time, any place – the wish

One of the widely acknowledged benefits of e-learning is its capacity to deliver training at any time in any place.

Large numbers of people can be reached. The project kicked off in April 2002 with a pilot run in Benelux, and was then rolled out across the firm's (Aggreko) other locations, reaching the UK in quarter three of 2002 and North America by the end of the year.
IT Training, March 2003.

Some organisations provide learning centres external to their premises. Sainsbury's has branched further into the training arena by launching its second learning centre, in the West Midlands The move follows success of the initial centre in Reading which created additional learning facilities for both Reading and Newbury colleges ... "It's not like a drop-in Cyber Café", says Hobbs (Sally Hobbs, Sainsbury's Project Manager). "Learners have to sign up for specific courses at the supermarket centre, but the training will be supplied by the colleges. It should cost around £25, plus concessions."
IT Training, December 2002.

"Lean manufacturing is about helping manufacturers improve their productivity by reducing costs", explains Mike Price, Head of Practitioner Services at the Institute (the Manufacturing Institute). "Not all firms, especially the smaller ones, are able to send staff on training days, so we felt we could reach more by putting the course on-line."
IT Training, September 2002.

"We chose e-learning due to its accessibility, value for money and cost-effectiveness," says Judith Pittaway, IT Training Manager at the London Borough of Tower Hamlets. "Using e-learning enables us to increase the reach of our training across the whole organisation which is important because we are not only a large Council, but have staff spread across 40 sites."
IT Training, 6th May 2003. The article goes on to highlight the fact that staff have access to training either in a learning centre or at their desk tops.

Last year the BBC's learning Intranet – Learn.Gateway – reached 14,000 staff ... *One of the pledges made by Nigel Paine (BBC's Head of Training) is to provide access to on-line learning outside the BBC.* He will provide access to on-line learning resources outside the BBC rather than keeping the material behind the BBC's firewall, accessible only from organisation machines as is currently the case. "I can't stand up in public and say we have to provide access to training 24 hours a day, seven days a week, if we don't offer access to our own resources outside the BBC", says Paine. "And I am not prepared to put it on CD-ROM when there's a massive infrastructure which can be used to do it." Part of the reason why it is so important these on-line resources are made accessible is the proliferation of freelance workers across the industry "I think we have a moral obligation to share information with freelance workers", says Paine.
Personnel Today, 1st July 2002.

Any time, any place – the reality

Problems with IT availability and access still create barriers. As a result firms may adopt technology solutions that are not on-line

Accessible training is not always achieved on-line. Metroline donated a double-decker bus which was converted into a mobile learning centre using 11 PCs and a mini library of learning resources. The bus travels between eight garages on a rota base, offering staff training in IT skills. It has helped 140 employees gain accredited qualifications and stimulated the demand to progress to the European Computer Driving Licence. Personnel Today, 15th April 2003.

Reporting on research completed by the CIPD into the accessibility of PC systems at work from a group of 12 employers: their answers varied from virtually 100% (Guidant) to 50% (Glasgow City Council Housing) and 33% (Surrey County Council). Access issues often relate to the organisational context. For example, in our research, organisations reported that call-centre staff, non-office-based local government staff and customer-facing staff generally all presented problems in terms of access to e-learning, as the nature of their jobs keeps them away from a computer during the course of a normal working day. “We won’t be doing anything different to desk-top learning, as our experience of learning centres is that they are not very well used” (John Newell Interbrew). Learning centres are seen as better environments for people to learn because the risk of distraction and interruption is reduced. The Change Agenda, CIPD 2003.

Surveys repeatedly show that a lack of bandwidth is one of the main barriers to the successful implementation of e-learning. Head office may be happily video-streaming at high bandwidths, but that’s little consolation to a field agent who is struggling to update his knowledge on a laptop PC in a motel room near Junction 11. Sam Tulip, People Management, 20th February 2003.

Linkages with trainers

Working with face-to-face trainers increases success rates and on-line collaboration is the way ahead.

“But whatever the use of technology – today or in the future” says Jonathan Bishop, Deputy Headmaster of Broadclyst Community Primary School near Exeter “I still teach in exactly the same way. Technology has to enable and enhance learning. In the past we used slates, chalk and blackboards – today we are using interactive content, networks and email. But the principles and philosophies in the classroom don’t change. Communication and collaboration are everything – Microsoft products help us do this far more effectively than before.”

Learning Lab Journal, January 2003.

“Combining a self-paced e-learning course and instructor-led workshops, BUPA prepared 700 UK support and sales staff for the launch of its Heartbeat Insurance package in just five weeks. Staff initially took the on-line course to learn about the product, before attending a workshop tailored to their job role.”

IT Training, December 2002.

An on-line product aimed at training trainers. “The on-line product will offer an introduction to contracts between trainees and building firms... the tool is targeted at lecturers and tutors and is expected to fill a hole in current higher education engineering and architecture curriculums.”

IT Training, November 2002.

The instructor is an important part of an e-learning implementation. “NETg conducted a study into e-learning. It found that blended learning based around instructor-led tuition outstripped other training models centred on text, e-learning and scenario-based training. The ILT approach resulted in a 163% increase in on-the-job accuracy, compared to people who received no training at all. However the e-learning blend performed worst and delivered just a 99% increase.”

IT Training, 6th May 2003.

“E-learning has moved beyond web-based modules accessed at the individual’s desk through an Intranet. A useful distinction is made by a US commentator, Professor Allison Rossett of San Diego University. She distinguishes between the ‘stuff’ and ‘stir’ of E-learning. By ‘stuff’ she means the re-usable web-based learning objects which are deployed on corporate Intranets. The ‘stir’ refers to the collaborative tools of E-learning, such as on-line discussions and virtual classrooms.”

The Change Agenda, E-learning the Learning Curve published by CIPD 2003.

Linkages with HR systems and processes

Successful e-learning implementation links closely with performance management.

The development of on-line appraisal systems linked to competency frameworks means it's high time that training professionals sat up and took note of the impact a 360 degree feedback can have.

Personnel Today, 1st February 2003. The article emphasises the link between competency frameworks, on-line systems and appraisal. Interestingly there is no specific mention of e-learning.

A survey on appraisal processes shows that 99% of respondents agreed that appraisal improved individual performance. The same survey showed that 89% felt that it identified training/development needs but appraisal results were not used to identify the training that might be offered.

Employment Trends, IRS Employment Review 769, 7th February 2003.

Linkages with business systems

Linkage with knowledge management

Telecom Italia, Italy's biggest telephone operator, has rolled out a knowledge management system to all its 15,000 employees to help deliver e-learning more effectively. The system will take over the handling and ordering of the firm's e-learning courses, it will also break on-line material into bite-size modules, enabling learners to find the relevant sections of a course.

IT Training, 6th May 2003.

Linkage with business systems and line managers

Directly linking access to e-learning to points of business relevance is also a good strategy. 'Real men' don't habitually visit the learning portal to see what kinds of new courses are available. But they do use the sales management system and might follow the link to some e-learning covering a new product they'd not previously looked at. Integrate links to learning within the context that might initiate the need.

Impact, April 2003. Quarterly update from the CIPD New Trends in Training.

Jessica Rolph reporting on the result of the 2002 survey.

Training courses are giving way to more bespoke training; training is more closely integrated with the organisation's agenda; senior managers are taking training more seriously and line managers are substantially more involved in the delivery of training.

Impact, April 2003. Quarterly update from the CIPD New Trends in Training.

Jessica Rolph reporting on the results of the 2002 survey.

The Department of Transport's vehicle inspectorate trained 1500 staff in six weeks.

The Intranet holds the details of all staff training ... line managers can quickly view available courses on-line and drill down to access the information they need about learning outcomes, course dates and availability. DoT intends to introduce a knowledge management system during the next year and this will necessitate significant re-training.

IT Training, April 2003.

Leadership and management behaviour

In many companies the links between line management and trainers is insufficiently close. E-learning works better when line managers are involved.

Line managers ... seem to have the ability and knowledge to provide effective support for learning. A quarter (26%) of respondents report that line managers in general have a great deal of ability and 60% some ability. The changing role of line managers in training, *Jessica Ralph reporting on the results of the 2002 IPD survey, Training and Development 2003. Impact, April 2003. Quarterly update from the CIPD New Trends in Training.*

Almost half of trainers are in organisations where they have difficulty getting sufficient help or support from senior managers and directors in developing an adequate training strategy. *Martyn Sloman, Training in the age of the learner, September 03, CIPD.*

Staff on maternity leave from Japanese cosmetics firm Shiseido are being kept up-to-speed with business developments and training, thanks to a new e-learning scheme. "Many of the courses are popular, but it's the monthly communication with bosses that is most appreciated by staff" says Toshiaki Igata. *IT Training, December 2002.*

The benefits that both learners and managers saw in the course (training for factory floor workers in the Polymers industry at NVQ Level 2) will be familiar to readers. They particularly liked being able to fit the course into their working day, relating what they learnt to their own machines and talking it over with colleagues, and they commonly found the course more exciting and more motivating than class-based learning. Managers were very positive, despite none of them having any experience of Internet-based training for factory floor workers. *People Management, 21st November 2002.*

What we need to realise is that e-learning is not smart *per se*. But it does require a smart environment. This involves not simply the delivery of materials on-line with some on-line support from competent on-line tutors. It needs a supporting cast of other staff who understand what is going on for the learner and who are themselves e-functional. *Simon Mauger, Adults Learning, March 2002.*

Culture and learner support

Support to learners comes from colleagues, unions and managers.

Think culture change. E-learning represents a new way to learn and work. It takes time to help employees – and their managers – understand, accept and value this transformation. Use opinion leaders, build on small successes and, most of all, implement a change management programme long before you launch, so that everybody is ready, willing and able to use E-learning.

Marc Rosenberg, People Management, 3rd April 2003.

Unions are appointing learning representatives. Employers are not always ready to embrace the union-led learning agenda. However, engineering Union AMICUS has a national network of URLs and organisers to encourage people to become learning reps. It has encountered resistance from employers who consider training to be a burden on business, according to AMICUS director Richard O'Brien.

Personnel Today, 15th April 2003.

The experience has indicated the need for learner representatives to be able to identify when learners may be experiencing difficulties. There is now a need to train learner representatives to recognise learning problems.

European Observatory Report describing working practices within Birds-Eye Walls.

“A learning experience is more than just on-line, it's about learning from others in the workplace, connecting to others and finding out how to share information. All these aspects of learning can be supported, but resources must be devoted to the exercise.”
Betty Collis, Shell.

Martyn Sloman, Training in the age of the learner, September 03, CIPD.

Protected learning time is sometimes guaranteed, although problematic to implement. For its ECDL project, Surrey County Council has asked every learner and their manager to complete a learning contract.

Martyn Sloman, Training in the age of the learner, September 03, CIPD.

A major factor contributing to the success of an e-learning programme is ensuring that support is always available to students, especially given the fact that they are often accessing the course material on their own and outside office hours.

E-learning supplement, Training Magazine, January 2002.

Training function capability

E-learning presents the opportunity for trainers to take a more consultative role. Those in the training function need a set of new skills to fill the new roles.

Reporting on the CIPD survey Training Trends: Past, Present and Future. There has been a significant increase in the importance to learning in the organisation. This has taken place at three levels. First, in the workplace, with trainers now having to make more effective use of the workplace as a source of learning and performance improvement. This is reflected in the experience of 78% of the 2003 respondents, who reported that the training department is becoming more 'a facilitator of learning' than a 'provider of instruction'.

Professor David Ashton, Training Trends: Past, Present and Future, CIPD 2003.

One important but complex area new e-learning customers need to understand is the relationship between content, such as courses, modules and curriculums, and the technology that helps them work.

ASTD Learning Circuits, June 2002.

Re-think your training function and its role. Seeing e-learning as simply a new way to do what you've always done will severely limit your influence and effectiveness. To have more of an impact, training departments must forge stronger alliances with IT and business units in ways they have not done before. And it goes without saying that re-skilling will be a big part of that transformation.

Marc Rosenberg, People Management, 3rd April 2003.

Learners' perspectives

Learners seem to like on-line material but need to talk to other people as well.

“We asked people how they wanted to be trained and they wanted flexible, instructor-led training, rather than scheduled courses” explains Teresa Cogan, Wragge & Company’s IT Training and Development Manager. The response was to use a blended training approach that made some use of e-learning, but relied primarily on instructor-led training, which was organised to be as flexible and as accessible as possible to staff.

IT Training, March 2003.

Chemical and pharmaceutical giant Bayer has extended its use of blended learning after a resounding ‘thumbs up’ from staff that took part in a pilot scheme. Around 91% of those who completed the blended PC skills programme said they would be happy to continue learning in this way.

IT Training, May 2003.

As Julia Jones, director of Drake Learning Solutions, notes: “Completion rates for E-learning courses are not high, and there are several factors that exacerbate the problem; the training environment, uninteresting subject matter, isolation (learning without peer support), organisational/cultural values that aren’t geared to accommodate learning, and a lack of technical support.”

Uplifting Learning, People Management 20th February 2003.

“Blended learning, if used strategically, can be a way of shifting the culture from passive to active learning. It can put the onus on the learner and the facilitator to share the learning experience.”

Michele Martin, Nestlè, E-learning the Learning Curve, CIPD 2003.

ROI – Cost saving

Many organisations are willing to report potential and actual cost savings.

In the early days of e-learning there were some wildly optimistic figures bandied about for cost-effectiveness and ROI, and in an e-learning magazine survey a third of corporations put the difficulty of measuring ROI as a major obstacle (although much the same could be said of conventional training).

People Management, 20th February 2003.

Lifeboat charity the RNLI has premiered its range of internal CBT packages at the London Boat Show. The courses, which will be used by some 9,500 RNLI members, cover Sea-survival, Marine-collision Regulations, Navigation Systems, Radio Communications and a primer course to help engineers to prepare for all exams. The RNLI expect significant savings to result from adopting CBT. “We project that we will save £80,000 in the first year, mostly from reduced travel and accommodation costs,” says Chris Wilkinson, the RNLI’s Operations Training Manager.

IT Training, 6th May 2003.

The implementation of NETg’s e-learning has also enabled British Airways (BA) to deliver training in a huge range of subjects that would not have been possible in the classroom due to cost. With nearly 400 courses accessed on average 980 times per month, usage has been high and cost savings have been massive with over £1 million saved a year.

*Learning Lab Journal, January 2003.**

Craig Brown, IT training manager at Leonard Cheshire, says: “Through the consortium, we can deliver extremely cost-effective IT and management skills training to our staff, many of whom are geographically disbursed across the UK. E-learning will allow us to save costs in terms of time and travel.”

Training Journal, April 2003.

IBM hopes to save \$1 billion a year (£620 million) thanks to the introduction of an LMS that will support the training of an estimated million people, it was revealed last month the company expects that the hoped for savings will flow once the implementation is complete, and training materials have been adjusted.

IT Training, April 2003.

Alison Walker, manager of training, design and development at British Airways, stressed that e-learning was a worthwhile journey. BA will soon have to put 30,000 people through a training course, so economies of scale can pay dividends, she said, “Budgets savings have always been a prime drive for us. We have saved £8 million a year – a figure we expect to increase.”

*People Management 17th April 2003.**

For the Royal Bank of Scotland, cost-benefit was a key driver in the introduction of e-learning and it was considered important that they could calculate this in order to demonstrate its value to the business. The return on investment they report is 7:1.

E-learning the Learning Curve, CIPD 2003.

“We measure anything between 10 minutes and three hours, and equate it to equivalent training days. We multiply that figure by three as one hour on-line is equated to three hours in the classroom. Then we calculate associated training costs.”

Elaine Wilson, British Airways, reported in E-learning the Learning Curve, CIPD 2003.

*The savings cited by BA are higher than those cited by NetG. This will be because BA is likely to be commenting on total savings to the business while NetG will be commenting only on the work they carried out.

ROI – Benefits

Training produces improvements in soft measures (like employee satisfaction). There is a link between this and the bottom line but not all organisations recognize the link.

HR director of B&Q, Mike Cutt, is able to point to a direct correlation between customer satisfaction and sales – where stores have demonstrated an increase in service levels, they also generated higher revenue and profit. “So if we invest in training and increase service, it has a bottom-line impact”, says Cutt.

Personnel Today, 8th April 2003.

THINQ Limited recently completed a survey of IT managers. The results identified “clarity as the expected results and benefits of the programme” (44% of respondents) and “training for all affected end users on how to use e-learning” (43%) as the two biggest doubts in the minds of potential purchasers. Difficulties measuring the return on investment provided by e-learning, coupled with doubts about the quality of training provided to employees who would use a new system, are the two most important factors limiting the use of on-line learning, according to this research.

People Management, 4th March 2003.

Within call centres there is considered to be a problem with staff retention. On average, it is estimated to be around 30 to 40%, Watson (Scott Watson, director of performance at Sonnet consulting and Training) blames poor training and management techniques for that figure, along with rapid technical change.

Current measurement practice concentrates on usage, recording and reporting on time spent on-line.

E-learning the Learning Curve, CIPD 2003

Commenting on the CIPD training survey, Training and Development 2003, Ewart Keep, deputy director at the ESRC Centre on Skills, Knowledge and Organisational Performance, said that it was currently impossible to tease out evidence showing the exact effect of training on the bottom-line. “One can have an intuitive belief that training affects the bottom-line, but it is impossible at the moment to prove it.” says Keep.

Participants in a survey by IRS do not appear to measure consistently the impact of training, with few stating they regularly use any single measure. However, around a third regularly assess quality improvements and output improvements. Other measures cited include retention rates, cost and time savings and customer complaints.

IRS Employment Review 761 Employment Trends, 7th October 2002. In the same survey only 10 out of 87 participants regularly measured hard data in their training evaluation methods. 24 out of 87 never used hard data and the remainder used it occasionally.

ROI – Linking soft measures to business benefit

There is evidence that good HR practices improve business performance

People fail to recognise many non-cost related benefits of e-learning solutions, such as reach, consistent messaging, and flexibility Unfortunately, efficiency and speed are rarely accounted for in ROI calculations. Yet in a very real sense, they have a significant impact on bottom-line performance.

John V Moran CEO of E-learning technologies, ASTD Learning Circuits, February 2002.

The Birkbeck College, London-based project (funded by the ESRC Future of Work Programme) found that financial performance, measured by profit per employee, is enhanced where good HR practices are in place. *The same article reports on a CIPD study by the Institute of Work Psychology at the University of Sheffield.* People management practices linked to the acquisition and development of employee skills ... were seen as significant (in a link with business performance). *The Workplace Employee Relations Survey 1998 is also reported on in this article.* People management policies such as off-the-job training, regular performance appraisals, team-working ... were found to be particularly effective (in delivering better economic performance, workplace well-being and a better climate of industrial relations).

Employment Trends, RIS Employment Review 754, 24th June 2002.

Reporting on the CIPD's research project completed by Bath University. It's the little things that make all the difference: career development, training opportunities, the influence and challenge of a job, involvement, appraisals, work-life balance. Done well, these fundamental HR practices produce highly-committed motivated employees.

People Management, 15th May 2003

Some Examples

The use of e-learning is increasing and reaching more organisations.

Training methods have become more sophisticated and have incorporated the latest technology – for example, 48% of respondents use e-learning, a jump from 26% in 1999. *New Trends in Training, CIPD 2003. Reporting on their 2003 survey into training and development.*

High-class pen and accessories firm Mont Blanc is training hundreds of its retail employees worldwide with the help of a learning tool based on the Who Wants To Be A Millionaire? game show. The Intranet-delivered tool tests staff on their knowledge of company products and practices as well as encouraging friendly competition between stores, with prizes for the teams that score the highest. *IT Training, January 2003.*

More than 65,000 people in the electricity industry will be able to access e-learning modules via a new learning web-site. Topics include generation, distribution, trading, environment, and health and safety, and each 15-minute module concludes with a test. “At our launch last month, members of our training and HR departments took the pre-test on the industry and no-one got all the questions right”, says Bill Fenton the head of the Electricity Training Association. “This proves there is a definite need for a basic knowledge resource that is available to everyone in the industry.” *IT Training, August 2002.*

The second phase of an ambitious US Government e-learning project kicked off last month with the aim of offering a suite of 2,000 courses to 1.8 million US Government employees. *IT Training, February 2003.*

Our latest survey reveals that, again, the HR profession is yet to embrace the possibilities of the worldwide-web ... In other areas use of Internet facilities is minimal. Just 17% use on-line training services. *Employment Trends, IRS Employment Review 764.*

54% (of companies surveyed) provide on-line information on training courses, once again an increase on 2,000, when 44% of respondents did so. *Employment Trends, IRS Employment Review 764, 25th November 2002.*

Appendix G – Questionnaire

Introduction

ASK TO SPEAK TO PERSON RESPONSIBLE FOR TRAINING AND DEVELOPMENT WITHIN THE ORGANISATION (COULD BE HR MANAGER/ DIRECTOR, TRAINING MANAGER)

Good morning/ afternoon, my name is and I am calling from HI Europe, an independent market research company.

We are conducting a major research study on behalf of **learndirect corporate** to identify organisational issues that impact on the successful implementation of learning, and e-learning specifically, within UK companies. This is an industry-wide project, the findings of which will be publicly available and will feed into the development of a series of audit tools designed to help organisations move towards greater embedding of learning.

Section A: Screening questions

A1 Do you either have overall responsibility or shared responsibility for training and development within your organisation? **Code one only**

- 1 Overall responsibility
- 2 Shared responsibility
- 3 Neither

A2 How many employees does your company employ in the UK as a whole?
(Take nearest approximation if unable to give precise number)

Write in _____

If less than 500, thank and close

		Quota group
1	500 – 999 employees	500-99
2	1000 – 2999 employees	1000-2999
3	3000 – 4999 employees	3000+
4	5000 – 6999 employees	3000+
5	7000 – 9999 employees	3000+
6	10000+ employees	3000+

A3 What is your company's primary business activity? Write in _____

		Quota group
1	Agriculture, forestry, fishing	Mfg, transport, utilities
2	Mining	Mfg, transport, utilities
3	Construction	Mfg, transport, utilities
4	Manufacturing	Mfg, transport, utilities
5	Transportation	Mfg, transport, utilities
6	Communications	Mfg, transport, utilities
7	Utilities	Mfg, transport, utilities
8	Wholesale	Retail, wholesale
9	Retail	Retail, wholesale
10	Finance, insurance, real estate	Finance
11	Services	Services
12	Public sector	Public sector
	Other (please specify....)	

A4 Before we continue, can I ask whether your company currently uses e-learning or has any plans to use e-learning in the next 12 months? **Code one only**

By e-learning we mean the use of an Intranet or the Internet to deliver learning material to employees either at their place of work or elsewhere.

- 1 Currently use e-learning
- 2 Plan to use e-learning in the next 12 months
- 3 Neither

A5 **(If 3 at A4)** Can I ask why?

Probe fully _____

Thank and close

Section B: Overview of learning and training strategy

B1 Which of the following would you say are factors primarily driving your company's HR and training strategy? **Multicode, rotate**

- 1 Attracting better people
- 2 Gaining competitive advantage by having a more skilled workforce
- 3 Being seen as a caring employer
- 4 Keeping staff motivated
- 5 Legislation
- 6 Meeting customer requirements
- 7 Other (please specify...)

B2 Which of the following types of training have employees in your organisation undertaken in the last 12 months? Multicode

- 1 Health & safety
- 2 IT skills
- 3 General management skills
- 4 Customer service
- 5 Communication skills
- 6 Sales training
- 7 Industry specific
- 8 Other (please specify....)

Section C: Experiences of e-learning

C1 Thinking about formal training and development as a whole in your organisation, what would you say is the % split between classroom learning, e-learning and other forms of distance learning.

_____ % classroom learning

_____ % e-learning

_____ % other forms of distance learning (e.g. workbooks, videos, CD ROMs)

C2 And thinking ahead 2 years, how would you like the % split to look.

_____ % classroom learning

_____ % e-learning

_____ % other forms of distance learning (e.g. workbooks, videos, CD ROMs)

C3 Thinking about e-learning, what do you think the biggest benefits of e-learning are to an organisation like yours? **Prompt, multicode**

- 1 Cost savings
- 2 Greater accessibility of learning
- 3 Greater flexibility of learning
- 4 Greater quantity of learning
- 5 More effective learning
- 6 Better focus on business requirements.
- 7 Record keeping for compliance issues
- 8 Other (please specify....)

C4 What do you think are the key drivers for adopting e-learning in your organisation? **Prompt, multicode**

- 1 New regulations
- 2 New processes
- 3 New products
- 4 New IT systems
- 5 Senior management pressure/championing
- 6 Organisational change
- 7 Improved technology (internet, intranet, bandwidth)
- 8 Demand from younger recruits who have previously used e-learning
- 9 Maintaining a public image of a progressive organisation
- 10 Other (please specify...)

C5 **Ask those currently using e-learning (1 at A4)**

What would you consider to be the main successes with regard to e-learning in your organisation? **Do not prompt, probe fully**

Write in _____

1. Supporting a major new sales programme or product launch
2. Supporting the installation of a new IT system or change in procedure
3. Ensuring compliance to new legislation
4. Changing attitudes to learning and training
5. Reducing the cost of training whilst increasing its use
6. Demonstrating that the training function adds real value to the business
7. Other (please specify...)
8. None/ too early to tell (**skip to C7**)

C6 For each factor mentioned at C5

Please give an example of how have you quantified or measured this success.

Probe fully

Write in _____

C7 And what would you consider have been the main challenges for your organisation either in implementing e-learning or in building a case for it?

Do not prompt, probe fully

Write in _____

1. Our technology infrastructure does not (did not) have the capacity or capability to deliver the volume of e-learning required
2. Difficult to prove there will be (there was) a return on the investment
3. Learning and training are low priority items for our organisation
4. There is insufficient e-learning content relevant to our business needs
5. No immediate business reason to change the way we do things
6. Other
7. None/ too early to tell

C8 Ask those currently using e-learning (1 at A4)

In which of the following locations is e-learning currently delivered to employees in your organisation? **Code all that apply**

- 1 External training centres
- 2 Internal training centres
- 3 At employees' desks
- 4 At home

Section D: Embedding e-learning

I would now like to go on to discuss the critical success factors in embedding e-learning in organisations.

Read out: By embedding e-learning, I mean that e-learning is a part of the company culture, has transformed some business processes and is just as likely to be considered when there is a learning requirement as other training methods.

D1 On a scale of 0-10, where 0 is not yet implemented at all and 10 is fully embedded, where on this scale would your organisation fall at this moment in time?

0	1	2	3	4	5	6	7	8	9	10
Not yet implemented at all										Fully embedded

Section E: Business drivers

I would firstly like to look at **business drivers** for e-learning, by this I mean the extent that training strategy is linked to business goals and the degree to which this is measured.

E1 To what extent do the following statements reflect the situation in your company today? Please use a scale of 0-10 where 0 means does not reflect our situation at all and 10 means fully reflects our company's situation today?

	0-10 rating
There are short term business goals that training must support	
We have a training budget which is not related to 'bums on seats' but on the basis of the business initiatives that it supports	
Board level are convinced of the benefits of e-learning and they want us to move to e-learning	
We have an e-learning strategy which aligns with wider corporate objectives	
We have a training budget that is agreed by business leaders at the same time as other support functions such as IT and marketing and, in some cases, as part of the same projects.	
We continually modify our learning content to match our business objectives	

E2 Does your organisation have an explicit e-learning philosophy or strategy?

- 1 Yes
- 2 No

Section F: Training function capability

I would now like to look at ask you about the **capability of the training function** in your organisation

F1 To what extent do the following statements reflect the situation in your company today? Please use a scale of 0-10 where 0 means does not reflect our situation at all and 10 means fully reflects our company's situation today?

	0-10 rating
We have good links/relationships with those responsible for knowledge management	
We have the capability to manage external suppliers of e-learning content/services	
We have audited the capability of internal IT systems to carry e-learning.	
We have good links/relationships with the IT department	
Our internal training team is willing to embrace new ways of working with technology	
We have audited the skills of those in the training function against the skills required for e-learning	
We seek innovation from our external suppliers of e-learning	

Section G: Technology infrastructure

I would now like to ask you about the **technology infrastructure**. By this, I mean the capability of in-house IT function to support and deliver e-learning.

G1 To what extent do the following statements reflect the situation in your company today? Please use a scale of 0-10 where 0 means does not reflect our situation at all and 10 means fully reflects our company's situation today?

	0-10 rating
Almost all of our employees can find a place where they can use the Internet.	
Externally, our people can access the Intranet	
Many of our core business processes are web enabled	
Internally, everyone can access the Internet	
The IT Department is fully supportive of developing e-learning capability	
We can or do take electronic data about our employees from colleges and other training providers	

G2 Do you have the bandwidth and server space required to deliver all the e-learning you need internally?

- 1 Yes
- 2 No

G3 Do you have an LMS (learning management system) installed?

- 1 Yes
- 2 No

G4 Do you have a content management system for your e-learning installed?

(If necessary: by this I mean a database which can store learning content either as objects or as components of courses)

- 1 Yes
- 2 No

Section H: Capability of learners

I would now like to talk about the readiness and willingness of employees to engage in e-learning at or close to the workplace.

- H1 To what extent do the following statements reflect the situation in your company today? Please use a scale of 0-10 where 0 means does not reflect our situation at all and 10 means fully reflects our company's situation today?

	0-10 rating
Employees are open to new ways of learning	
Employees feel that their learning will be recognised and valued by their employer	
Employees are empowered to request their own training support and take ownership of their development	
Employee development is integral to business strategy	
Individuals are aware of how their personal contribution moves the business forward	

- H2 Thinking of the categories of employee within your organisation, which 3 of the following represent the most important targets for e-learning. Please rank 1, 2 or 3 where 1 is the most important?

	Rank 1,2,3
Director or top management	
Senior manager	
Middle manager	
Employed professional	
Employed position, working mainly at desk	
Employed non-manual position, not at a desk but travelling or in service job	
Supervisor or skilled manual worker	
Other manual worker	

H3 Which of the following best describes the current/expected response of your employees to e-learning? Code one only

- 1 Initial excitement then disenchantment
- 2 Embracing the concept in the long term
- 3 Reluctant acceptance
- 4 Largely sceptical
- 5 Outright resistance

H4 When organising training and e-learning do you assess your learners' preferred learning styles? Code one only

- 1 Yes
- 2 No

H5 Would you like more information about your learners' preferred learning styles?

- 1 Yes
- 2 No

Section I: HR processes and measurement

I would now like to discuss the **HR processes** in place to allow and encourage benefit to be extracted from learning.

- I1 To what extent do the following statements reflect the situation in your company today? Please use a scale of 0-10 where 0 means does not reflect our situation at all and 10 means fully reflects our company's situation today?

	0-10 rating
We need to assess and test employees and record the results for compliance purposes	
Individuals know what skills they require for the job they do now and the job they might wish to do in the future	
Managers appraise staff at regular intervals and plan their development	
Employees know what training is available to them and how to obtain it	
The HR department asks employees what they think of the learning support they get including how well it matches their personal aspirations	
We innovate in assessment approaches so as to match them to work practices	

Section J: Leadership and culture

I would now like to ask you about **leadership and culture** in relation to learning within your organisation

- J1 To what extent do the following statements reflect the situation in your company today? Please use a scale of 0-10 where 0 means does not reflect our situation at all and 10 means fully reflects our company's situation today?

	0-10 rating
The company demonstrates commitment to personal development via initiatives such as liP	
Managers coach their own teams	
Managers make time for employees to learn: at home, locally, at work	
Change management is an integral part of our deployment of learning	
Employees help each other learn	
Managers are willing and able to make space for e-learning	

- J2 Of the following 6 management responsibilities which we have already discussed, which do you think are the 3 most important to get right in order that e-learning can be effectively embedded within your organisation. Please rank these 1, 2, 3, where 1 is most important.

Management responsibility	Ranking
Business drivers	
Training function capability	
Technology infrastructure	
HR processes and measurement	
Leadership and culture	
Capability of learners	

Section K: Attitudes to **learndirect**

K1 Prior to this call today, had you heard of **learndirect**?

- 1 Yes
- 2 No Skip to K3

K2 And had you ever heard of **learndirect** corporate?

- 1 Yes
- 2 No

K3 Which suppliers of e-learning do you

- a) currently use to some extent **(IF 1 at A4)**
- b) would you consider using?

a)	b)	
1	1	ACT e-learning
2	2	AdVal Group
3	3	Apex Interactive
4	4	Bourne Training
5	5	Cardinus
6	6	CMGAdmiral
7	7	Docent
8	8	Echelon Learning
9	9	ELearnity
10	10	Epic
11	11	EQL
12	12	Ivy Learning
13	13	KnowledgePool
14	14	learndirect
15	15	NetG
16	16	Saffron Interactive
17	17	Skillsoft
18	18	Smartforce
19	19	Spring
20	20	Tata Interactive
21	21	VegaSkillsChange
22	22	Walkgrove
23	23	Wide Learning
24	24	Other (please specify...)
25	25	None, internally provided only

K4 If have relationship with learndirect (code 14 at K3a)

How satisfied are you overall with the service you have received from **learndirect**, would you say you are...

- 1 Extremely satisfied
- 2 Satisfied
- 3 Neither satisfied nor dissatisfied
- 4 Dissatisfied
- 5 Extremely dissatisfied

K5 If have relationship with learndirect (code 14 at K3a)

How do you see your business relationship with **learndirect** evolving over the next 12 months, do you seeing it....

- 1 Growing
- 2 Contracting/ shrinking
- 3 Staying the same

K6 Thinking about possible locations for delivering e-learning to your employees, please rank the following four options in terms of their appropriateness to your organisation's learning requirements. Please rank from 1 to 4, where 1 is the most appropriate and 4 is the least appropriate.

	Rank 1,2,3,4
External training centres	
Internal training centres	
At employees' desks	
At home	

K7 From what you know about **learndirect, and assuming you had a need, how likely would you be to use **learndirect corporate** to service each of the following requirements. Would you be.....**

	Extremely likely	Quite likely	Neutral	Quite unlikely	Extremely unlikely
Content					
LMS (learner management system)					
Hub and learning centre network					
Marketing and integration expertise					

K8 I would like to get your opinion on how you see e-learning in your organisation in three years time? To what extent do you agree or disagree with the following statements where 5 is strongly agree and 1 is strongly disagree. **CATI – rotate statements**

- a) E-learning will replace traditional methods of corporate training like classroom training
- b) E-learning will be the first method of training that people think of
- c) E-learning will be part of a wider offering to employees
- d) All employees will have learning records they can access and an electronic learning plan
- e) Our use of e-learning will not increase from where it is at the moment
- f) All employees will access e-learning at times and places that they prefer
- g) The organisation will have electronic access to the training records of every employee
- h) We will only be using e-learning for a few specialist applications
- i) Employees will regard access to the e-learning they want as part of the support and benefits they receive from the employer

K9 Thinking about other companies in your industry/business sector, would you position your company in the top 25%, middle 50% or bottom 25% in terms of embedding e-learning?

- 1 Top 25%
- 2 Middle 50%
- 3 Bottom 25%

K10 Can you name one company in your industry/business sector that you consider to be ahead of yourselves in terms of e-learning?

Write in _____

Section L: Classification

Finally, I would like to confirm some classification details with you.

L1 Approximately, what is your company's annual training and development budget?

Write in _____

(Take nearest approximation if unable to give precise number)

- 1 Less than £200,000
- 2 £200,000 – £299,999
- 3 £300,000 – £499,999
- 4 £500,000 – £750,000
- 5 £750,001 – £999,999
- 6 £1 million – £1,999,999
- 7 £2 million – £4,999,999
- 8 £5 million – £10 million
- 9 £10 million +

L4 Could I take your job title please? Write in _____

Thank and close

