
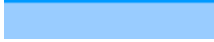



	<h2>Next Generation Learning @ Work in</h2>  
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<h2>Performance Zone - the heart of Online Learning @ Bupa</h2>	
<p>Earning a 'Special Mention Commendation' for 'Most Innovative Application of Learning Technology' in the 2008 e-learning Awards, this case study explores how an innovative approach has connected 'learning to performance' at Bupa delivering benefits to individuals and the business.</p>	  

Introduction

Bupa is an international health and care company with bases on three continents and more than seven million customers. Bupa's biggest and original business is health insurance in the UK, both for individuals and corporations that want to look after the health of their employees.

The PLATO e-learning portal, built and hosted by Futuremedia Learning (now part of Edvantage Group) and maintained by Bupa, has been in place since 2004. In that time the portal has successfully established Bupa's learning brand, consistently achieving 500 hits per month. Along the way, new functionality has periodically been introduced, including an online competency testing tool, and 'Ask the Expert' – for members of the community to get answers to particular queries from experts on those subjects within Bupa.

When Bupa UK Membership Services wanted to refocus its online learning environment around performance for their 3,200 employees, they developed an innovative, next-generation portal, Performance Zone. The design concept was to be based on a model of “**Think, Feel and Know**” through staff sessions run by Bupa.

As an example of Next Generation Learning, Performance Zone uses Web 2.0 widget technology (*A widget is anything that can be embedded within a page of HTML, i.e. a web page*) to provide a uniquely personalised online learning environment. Aided by the widget-based portal, learners can customise their own view of Performance Zone, choosing the information and online learning they need to help them meet their personal performance goals.

The Business Challenge

As a people-based business, it is an important priority for Bupa to invest in its employee’s learning and development. However staff feedback had identified a perceived lack of career development within the organisation, which it was felt had impacted negatively on retention and attrition rates. In response, Bupa implemented a new **High Performance Framework**. This has a focus on caring for people, results and customers, underpinned by Bupa’s enduring belief that if the company invests in its people the customer will benefit.

The Learning and Development function within Bupa realised it was important that staff should feel supported in being able to achieve what was required under the initiative, and would need help with any identified development in order to be the best that they could be. Within Bupa UK Membership Services, the PLATO learning portal was felt to provide a useful potential means of helping employees to take more ownership of their career development, and of supporting them in their efforts to become High Performers.

Keith Stopforth, Head of Talent, Bupa UK and North America spoke of his wish to upgrade the online learning environment provided by PLATO, with a particular focus on increasing staff retention in the UK Membership division. The improvement he foresaw was both quantitative and qualitative. Keith wanted to find ways of increasing usage of PLATO, while at the same time, he wanted to refocus the portal around performance, re-aligning its goals and objectives with those of the High Performance Framework.

While the PLATO portal had been extremely successful in fulfilling the objectives originally set for it, the world of e-learning had moved on and exciting developments had been seen both in the technologies available for learning and in the sophistication of learners.

Learners were sometimes confused about where to find the information they needed and combined with often short attention spans, was a major stumbling block in achieving more engagement with learning. Within UK Membership, time is allocated for personal learning at the computer but learners had to perceive maximum value from their visits to the portal to remain motivated. Learning accessed through the portal, it was felt, could be more directly linked to performance goals set under the

Framework, creating greater 'flow' within the process, and putting more control within the hands of individual learners to control their own destiny. This greater control and personalisation to the user would in turn, it was hoped, make the portal both more usable and more 'sticky' and increase both usage and engagement.

Business benefits expected from developing the portal were defined as follows:

- Increase the number of users logging on to PLATO
- Support Bupa's employee brand
- Enhance attraction and retention
- Develop Bupa's people across multiple sites and with multiple employment types more easily
- Raise performance levels across the business

The Venn diagram below indicates how three themes were identified for the redesign of the portal, with the learner placed at the centre of the diagram!



The strategy was simple:

- Understand what it would take to engage Bupa employees more fully with the portal.
- Leverage new technology developments to create a learning environment that engaged learners with their own career development more effectively.
- Launch the new portal in an attention-grabbing way to get as many employees engaged on the portal as possible.

For some time, the team within Bupa UK Membership had made use of learning champions to help with the spread and adoption of e-learning. This network also acted as a useful test-bed for new ideas such as Performance Zone. In a series of workshops groups of champions were tasked with describing what they would want people within Bupa to **think, feel and know** as a result of using the portal, around the three themes of **Transform, Perform and Inform**. Five main user outcomes were identified, expressed in the following statements:

- Bupa cares about my career.
- I feel supported in my career development.
- I know what I need to do to be a high performer in my role.
- There are tools to help me achieve my potential.
- I can find tools to help me improve my performance.

It was clear that ready access to personalised information would be important to achieving these outcomes. The team was confirmed in its belief that the personalised user interface they had envisioned would be the optimal solution to meet the business goals of the project.

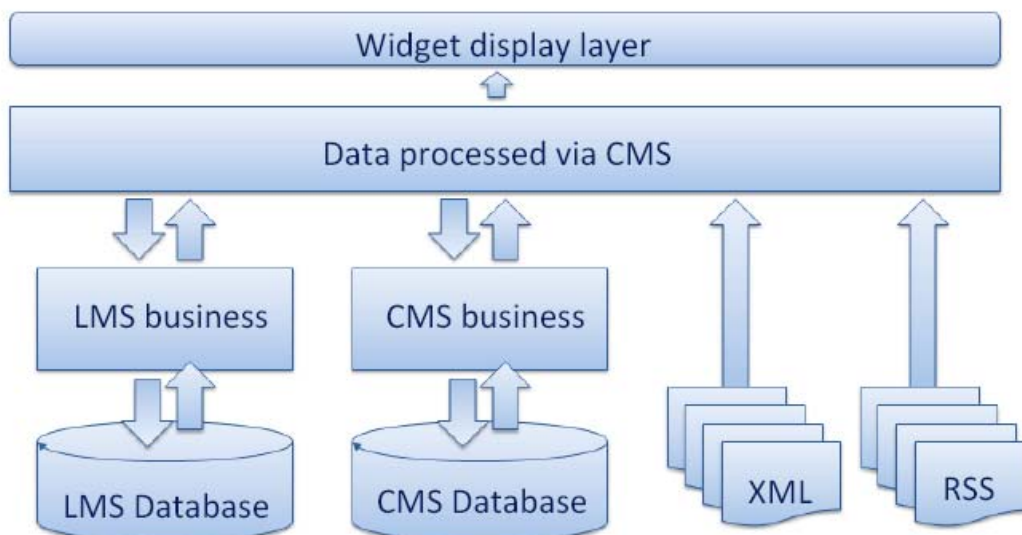
The Learning Solution

Four important strands came together in pointing to a solution:

1. The nature of Learning Management Systems was felt in many ways to be invidious to a good user experience. Management of one's own development should be an inspiring, creative thing – not a form-filling, numbers-driven exercise.
2. The spread of so-called Web 2.0 technologies such as Ajax had made dynamic, database-driven sites the norm and was changing the make up of web pages. On Web 2.0 sites, users no longer had to click away from the page to remain engaged. Information from diverse sources could now be brought together within a unified interface and presented in more user-friendly ways.
3. Sites such as iGoogle and the new BBC website were taking this a stage further with the use of 'widgets' or 'gadgets'. With the use of widgets, users on these sites are able to make up their own customised home pages from predefined interactive elements.
4. Statistics for the adoption of Web 2.0 sites such as Facebook showed not only a great numerical increase in internet users with more time spent on the internet relative to other media use, but also a change in the demographics of internet users. More women are now using the internet regularly, and the Web 2.0 phenomenon was spreading fast into other age groups beyond its original Generation Y popularity base.

The technology architecture which would deliver the 'widgetised' portal made use of Ajax and other open source technology, integrated with Edvantage's proprietary learning and content management engine. The widgets are able to display personalised data about the users learning enrolments, the learning catalogues, and

selected feeds from the content management system. The application utilises a unified login methodology facilitating single sign-on to all underlying systems. At a top level, this architecture is most easily represented by the diagram below:



Performance Zone would be divided into five 'zones':

1. My Zone
2. Perform
3. Inform
4. Transform
5. Extras

All content on each of the zones would be delivered by widgets, and the My Zone front page would have a default design which users could change at will, selecting and drawing in widgets from throughout the rest of the site to make up their own page, following the iGoogle model. Each zone would provide employees with different aspects of managing their own performance. The character of each of the different zones can be broadly summarized thus:

- **Perform** – how to be the best you can be in your current role.
- **Inform** – internal communications.
- **Transform** – career progression.
- **Extras** – linked to the whole of Bupa UK Membership Services learning library, the LMS, a direct link to HR and giving the ability to order headsets and other necessary equipment for learning courses.
- **My Zone** - customisable by the individual learner, picking and choosing from the pages above.

An example screen grab of one of the 5 zones (Perform) is shown below:

Logged in as **Clare Shell** (sign out)

Perform

Perform Zone
The Zones aims to support your in your Performance. The learning and information in this zone aims to support you being the best that you can be in your existing job role. Be a high performer with PLATO the Performance Zone!

Search PLATO for learning on... **SEARCH**

Most Popular Courses

- Financial Crime Learning and Test
- Introduction to Regulations and Test
- BUPA Health and Safety Risk Assessment
- Treating Customers Fairly 2007
- An Introduction to Regulation and Financial Crime

+ Add to My Zone

Open Workshops for Leaders

We currently have no workshops for leaders available, however if you would be interested in attending any of the below courses please email the **UKM Learning and Development mailbox** as we will be releasing some more dates for the second half of the year soon.

- Delivering a Change Message
- Understanding Sick Pay and People Curriect
- Managing Performance
- Managing Sickness
- Self Awareness
- Effective 1:1's and Coaching
- Disciplinary and Grievance
- Maximising Potential

+ Add to My Zone

Job Like Mine

Across UK Membership we have a number of different job roles. A Job Like Mine aims to provide you with an idea of what Bupa have to offer. Each month we profile a different job role, this month we have Helen Wade, Acquisition Marketing Manager. To Learn what Helen's role requires [Click Here](#).

To see all previous Job Like Mine profiles [click here](#)

If you would like to have your job role profiled then please contact the **UKM Learning and Development mailbox**

+ Add to My Zone

Swift Learning Centre

SWIFT Learning Centre

Access the SWIFT Learning Centre for all your SWIFT learning needs.

+ Add to My Zone

One life ideas

Don't forget that the One Life Ideas scheme is a great way to recognise a high performing colleague. If you know someone who has exceeded their job role

Ashridge VLRC

[click here](#) Ashridge VLRC is one of the UK's Leading Business Schools. This

Business Readiness Toolkit

- All the support and tools you need in managing and dealing with Change, Launch

+ Add to My Zone

HR Tools - HR tools quick access

- HR Policy Toolkit
- HR Charter
- People Connect
- People Connect Training Centre
- Performance Management
- SOP Toolkit

The team recognised from the outset that the benefits of the new portal would have to be effectively communicated and a degree of technophobia overcome to gain acceptance. Widget technology might be main-stream in the consumer environment, but its appearance in a working context would be unexpected. Also, not all of the workforce could be assumed to be confident computer users.

A launch programme for Performance Zone was planned and implemented in collaboration and a balloon-filled launch for Performance Zone took place at Bupa offices in Manchester and Staines on 2 April 2008, with Edvantage staff on-site offering support and overviews of the portal's features to employees. Promotional materials including a Bedlam cube, a slide puzzle and a poster were also developed as shown below:



The impact on staff

Initial reaction to the portal testifies that Performance Zone has completely hit the mark in providing simpler access to key information about learning, and increased learner engagement with the learning brand.

“A lot better and easier to use”

Tom Faynes – Bupa Recover – Salford Quays

“Easy to navigate, good to be able to customise ‘My Zone’ ”

Lisa Walton HR

“Good for new starters re:- Bupa Info. Like the My Zone as it saves times and it’s personal. Well Structured”

Linda Fearnough – National Accounts Bespoke – Salford Quays

“Can tailor to your needs”

Natalie Silvermann – Customer Relations – Salford Quays

“Seems really user friendly. Easy to customise to your own needs. You can find things and put them on your My Zone and do them when you have time”

Heather MacDonald – Correspondence – Salford Quays

“I like it. It is very focused, more of an insight into the business, and the directions you can go in. Free training appeals.”

Paul Hawkins – National Accounts Bespoke – Salford Quays

More recent qualitative surveys among members of the Champions Network also indicate that the improvements to the portal have been well received within the organisation.

“I don’t have to worry about sourcing the

“The great thing is you can spend as much time as

“It makes integration of learning and development

<i>information as it's all there for you on your homepage and it's very user friendly"</i>	<i>you want on it depending on how much you want to develop in the organisation"</i>	<i>into training plans a lot easier as the information is all there"</i>
<i>"I really enjoy using it"</i>	<i>"I don't have to do everything all in one go... I can dip in and out of information"</i>	<i>"I don't have to copy what other people are doing, it makes me feel like an individual"</i>
<i>"I feel a lot more confident as I work with new starters. I have better communication with them and I have noticed that since having Performance Zone they have behaved in a more proactive manner"</i>		

As Keith Stopforth says *"In the organisation we had a key goal of improving support to meet individual performance needs and we were driven to find an innovative solution to help us meet this challenge. Since the implementation of our new Performance Management Framework and the re-launch of PLATO we have really joined up Learning and Performance. We've had great feedback since the launch with a much greater focus on Learning for Performance. The 'connection' of the two is helping us to meet our key goal with PLATO playing a major role. Ultimately individuals and the business are benefiting."*

Next Generation Learning @ Work – 7 clear benefits

Performance Zone is a highly innovative application of existing technology to learning using widgets in the design of the Bupa learning portal that is delivering tangible business benefits:

1. It pushes LMS information and functionality out to learners in a seamless, user-friendly way, and it is a development that moves learning forward as the approach can easily be replicated elsewhere, using as it does open source technologies and the portable data language of XML.
2. It harnesses a popular, easy to use technology accessible to a wide audience to help overcome techno-fear and eliminate barriers to learning and career progression.
3. The qualitative and quantitative feedback show that Performance Zone has led to a more satisfactory learning experience for Bupa's employees.
4. This successful outcome represents a win/win between the business needs and user/learner needs, fulfilling all the aims of the project.
5. The project shows a strong partnership between client and supplier, jointly innovating, and also effective cross-disciplinary working.
6. The project demonstrates the linking of online learning to the attraction and retention strategy in Bupa UK Membership, showing learning technology applied to meet wider business goals.
7. The project demonstrates a broadening of the role of a learning portal to support people focused on their performance overall as well as learning.

NB: Reproduced from the 2008 e-learning Awards submission for 'Most Innovative Application of Learning Technology' for which BUPa & Futuremedia (now Edvantage Group) received a 'Special Mention Commendation'.