

eLearning in Practice

Three Case Studies Sponsored by Mentergy Inc.

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Introduction

In a recent IDC survey of training and education vendors, most respondents (62%) cited a significant change in business strategy due to the emergence of elearning and the Internet. The shift in vendor strategy has come in response to client demands for both a blend of training solutions as well as an enterprise training solution that includes "end-to-end" services and support.

One company, Mentergy Inc., was formed earlier this year when Gilat Communications acquired Allen Communication and LearnLinc Corporation. The following profiles of Mentergy customers illustrate how enterprise clients are using blended solutions and taking advantage of the availability of consulting services to help improve organizational training and address a business need. These cases studies, developed by IDC through direct interviews and research conducted in each company, are sponsored by Mentergy as a service to its clients and the learning industry as examples of "elearning in action."

IDC Opinion

What factors should companies consider when selecting an elearning solution?

Companies considering training as a solution for a business face a variety of delivery options, including:

- Broadband delivery of high-quality, video-intensive solutions
- Internet delivery of live, instructor-led classes or self-paced training
- CD-ROM delivery for training when not connected to the Internet
- Classroom training with or without simulations

Each of these options has specific strengths and weaknesses that must be considered before a solution can be constructed. For most companies, a single delivery "channel" for training is inadequate to satisfy all the training needs of the full range of target learners.

This companion piece to the IDC White Paper *eLearning in Practice: Blended Solutions in Action* provides three case studies of companies that have used blended approaches to address their elearning needs. The companies profiled include ExecuTrain, a provider of learning solutions, Countrywide Home Loans Inc., and Autodesk.

eLearning in Action — How Does It Work?

eLearning in action often demonstrates value because of traditional measures like cost savings, increased effectiveness, and convenience. At the same time, the value of blended solutions is most strongly evidenced by the ability of companies to solve otherwise intractable business problems: adapting to market changes, rapidly adjusting organizational behavior, dispersing workforce training, and attracting and retaining new customers. Several companies have adopted blended solutions to solve pressing business problems. An analysis of their situations and unique conditions demonstrates the range of solutions available and how a blended solution best meets their particular needs.

ExecuTrain

Business Issues

ExecuTrain, the global provider of IT skills training with more than \$180 million in revenue in 1999, has been in the standup training business for 16 years. At a client summit a couple of years ago, ExecuTrain's largest clients wanted the company to move toward an Internet delivery model that would help clients better leverage their training dollars.

ExecuTrain's clients needed ways to reduce the cost of training-related travel and time away from their workplace. At the same time, ExecuTrain's core strength was its instructor-led, brick-and-mortar training model. Its training methodology focused on ExecuTrain's ability to provide the right training to the right audiences. ExecuTrain couldn't abandon its strengths but had to find a way to address a client need. "Ultimately," according to Dr. Kevin J. Eames, chief learning officer for ExecuTrain, "we need to provide training anytime, anywhere."

ExecuTrain evaluated its content offering and believed that much of its training content could be delivered effectively using a technology delivery solution. It also found that beyond the "effective delivery" was a penultimate need of effective reception of the training. With global clients and the range of learners and available technologies that it covers, ExecuTrain felt that a single delivery solution could not effectively address its clients' needs.

Solution

During the past year, ExecuTrain has been working with LearnLinc, now part of Mentergy Inc., to develop a low-bandwidth, Internet-live training option for ExecuTrain's clients and a self-paced training option for more than 50 course offerings.

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ExecuTrain now provides training for three types of delivery: live instructor-led, live and self-paced Web-based training.

Its experience with blended solutions has kept ExecuTrain focused on its core value, effective training. At the same time, it has met its clients' needs of shorter courses, reduced travel, and increased relevance of the training content.

This effort has not been easy for ExecuTrain. Development for Web-based delivery is quite different from its standard instructor-led classes. There is a high degree of visual stimulation required, according to Eames. The learner must be actively involved every couple of minutes. However, those activities can be built into the ILT experience as well, raising the quality of all ExecuTrain courses. Additionally, the process of developing live, over-the-Web courses has focused ExecuTrain on the value of periodic assessments to help gauge the learner's understanding of the material. Although developing and delivering a blended training solution has taken effort, it also positions ExecuTrain for continued growth in the training industry. Table 1 summarizes some of the conditions and considerations that suggest various delivery options and ExecuTrain's ultimate blended solution.

Table 1
Summary of ExecuTrain's Conditions and Options

	Condition	Consideration	Delivery Option						
			ILT	Text	HBI	LBI	CD	WBT	
Content	Procedural, conceptual content changes	Scalable, easy updates	•	•			•	•	•
Learners	Diverse, dispersed	Sync, async, modular		•				•	•
Technology	Available to many, not all		•	•			•	•	•
		Chosen solution	•				•		•

Conditions suggest this solution = •
Source: IDC, 2000

Countrywide Home Loans Inc.

Business Issues

Countrywide Home Loans Inc. is the leading provider of residential mortgage loans and servicing in the United States. Founded in 1969, the company has more than 550 offices with a staff of over 11,000 nationwide. Countrywide is listed in the S&P 500. Its corporate offices are in Calabasas, California with overseas operations in London, Paris, and Rome. When the company needed to implement a new piece of business software, it became a logistical challenge. At the same time,

Countrywide provides new hire training for the branch offices, up to 45 people per week, five days a week.

Early on, Countrywide understood the value of a “blended” solution, though it was not working as well as it had liked. Countrywide typically used ILT (70% of the time) and conference calls (30%) to try to reach its entire target learner population. This mix was time consuming and a burden to branch operations.

With hundreds of offices scattered around the United States, training the sales force and other employees was a major consideration. Traditional methods for training and introduction of sales productivity software removed employees from their desks to bring them to central training venues, which incurred considerable travel and lodging expenses. Countrywide was looking for a better, faster, and more economical way of providing training.

Countrywide felt they could improve business performance, increase product knowledge, spend less time in training even for a large target population, and decrease the cost of training.

Solution

Countrywide has been working with Gilat Communications, now part of Mentergy Inc., to develop a training solution that could meet its needs while still maintaining the high-quality training the field offices had come to expect. Countrywide also had to implement a flexible training solution to meet the inevitable training challenges associated with an enterprisewide system rollout.

Using a high-bandwidth Internet solution (satellite) and self-paced, Web-based training (WBT, also delivered via satellite) combined with its traditional ILT, Countrywide believes it has found a mix that is right for them.

But again, some pain was experienced. Instructors and subject matter experts had to quickly learn to prepare content in HTML format. New challenges for instructors included presenting in front of a video camera, learning the system interface for the HBI tools, and managing a class during a live distance learning session.

Content conversion, rehearsals, recording, and editing sessions were also new to most members of the training and production team. But, according to Teri Hampton, Interactive Distance Learning Broadcast manager for Countrywide, “We couldn’t possibly have done some of the training without this system.”

Countrywide met its goals in record time.

- Offering more classes than traditional methods in a live format
- Maintaining employees in their branch environment while still attending training

- Cutting training cost per student in half
- Breaking even in about six months

Since October 1999, Countrywide has trained over 3,000 students compared to a typical 840 people in ILT classes. It has also extended its continuing education offerings to more employees.

Hampton believes the company’s HBI solution and shorter classes “have enhanced the training experience and allows immediate implementation of learned topics.”

Table 2 summarizes some of the conditions and considerations that suggest various delivery options and Countrywide’s ultimate blended solution.

Table 2 Summary of Countrywide’s Conditions and Options								
	Condition	Consideration	Delivery Option					
			ILT	Text	HBI	LBI	CD	WBT
Content	Procedural, behavioral some changes	Moderate update	•		•	•		•
Learners	Dispersed, homogeneous	Sync, offered frequently	•		•			
Technology	Limited, variable		•		•			
		Chosen solution	•		•			•

Conditions suggest this solution = •
Source: IDC, 2000

Autodesk

Business Issues

Autodesk has a more complex problem — how to increase the performance of an extremely large and diverse group of people, including users of their software products, their business partners, and their employees. To complicate matters further, Autodesk will never meet or work directly with most of these people.

Autodesk is the fourth largest PC software company in the world, with nearly \$1 billion in revenue. It has as many as 50 products translated into 20 languages and sold in more than 150 countries. Autodesk is also a “virtual corporation” in that it primarily distributes, sells, and supports its products through partner programs of authorized dealers and training centers. Autodesk estimates there may be up to 20 million users of the 4 million licensed copies of Autodesk software in use, on top of the approximately 60,000 partner personnel, and about 3,000 employees worldwide. Multiplying the magnitude of the challenge

even further, Autodesk has an extensive set of developers who create whole new products by customizing Autodesk technology for specific professions, tasks, and industries such that many users are unaware they are even using Autodesk software.

For Autodesk, better learning for its customers means more revenue for its partners and, in turn, more sales of Autodesk products and services.

Autodesk's learning focus is on improving the performance of all those who use or support its products in a context that is directly relevant to their individual needs or jobs. That means Autodesk training must be appropriate not only to the user's familiarity with the product but also to the tasks that the learner performs in the vertical market that the learner works in, such as civil engineering, manufacturing, video-graphy, and cartography.

This audience can be broken into three tiers of learners:

- **Internal users, partners, and trainers.** This includes 3,000 Autodesk employees, 4,300 resellers companies, 2,200 developer companies and nearly 1,000 authorized training centers
- **Business partner employees.** Up to 60,000 learners who use Autodesk as part of their professional work
- **Students, groups, and end users.** One million students educated in U.S. schools and more than 200 user groups and nearly 4 million registered customers

There is nothing homogenous about this group, and Autodesk wants to address the group not as a market but as individuals.

Autodesk realized that a "one size fits all" approach, such as using ILT alone, was out of the question. Rather an adaptive approach, spanning a range of learning models, such as self study, instructor led, knowledge management and performance support drawing from a wide range of resources, was required. In fact, the goal is not to reduce the number of students who attend ILT classes, but it is to reach people who otherwise would not go to training. In some recent experiences, Autodesk found that 30% of its users who took advantage of the blended delivery Autodesk offered had never attended any previous training.

As they look ahead, Autodesk expects its product cycles to move toward releases that are much more frequent. New software releases in some cases have moved from two years to as frequently as every six weeks. In the future, it is likely that the concept of product releases will be transformed into a continuous availability of technology. If that is to happen, learning must follow suit and be continually updated and continually available.

If learning is going to be continuously updated, the delivery mode must also shift. There is no point in attending a two-day course to cover advanced features that will be obsolete before the course is finished. Courses must be shortened, targeted, and delivered whenever a user has a need for training. At the same time, learning content must be available to a learner from a variety of sources: resellers, training centers, or business partners.

Solution

To uncover the blended solution that could dramatically change training, Autodesk considered a range of solutions. It looked at low bandwidth Internet solutions that simply required a browser to deploy. Although the simplicity of a browser was important, the learning and performance solutions sought required more capability. In essence, what was required was an environment for managing this large range of content and an environment that maximized the learning and performance of all those using it. With these requirements clear, Autodesk continued its strategy of partnership models and investigated external developers of such things as authoring tools and outsourcing arrangements. The result was the design and development of what is known as the Autodesk Learning Assistant (ALA), which has shipped as part of several million Autodesk products.

In the end, the blend of solutions that best fit included a CD-ROM, self-paced solution and a robust, low-bandwidth Internet solution (both live and self-paced). Additionally, the Autodesk team sought to collaborate with a learning service provider that could offer a range of services, including tool developers, content development, and consulting services.

Autodesk selected Allen Communication, now part of Mentergy Inc., to help develop and deliver on these complex requirements. Most of the content Autodesk needed existed before this project began. This was in the form of product reference documents, Help systems, product support documents, and previously developed training materials. Simulations and screen captures were developed separately and added to the total “pool” of available content.

One form of the Autodesk learning solution involved the use of Placeware technology for synchronous delivery of leader-led learning. Using this technology to prepare its partners for new product introduction, the instructors needed to demonstrate new features and functions while reducing the risk that those demonstrations would fail and disrupt the training. Pre-recorded demonstrations were developed that could be called up and displayed that had the feeling of a live demo, yet they were “bullet proof” and showed the application (sometimes pre-release versions) in the best possible light. This assurance also allows the instructor to focus on the students, and not on the technology.

Because events and simulations can be captured and replayed, learning events can be repurposed, edited, and assembled into new objects to be used in a wide range of situations from live training to product support.

Autodesk hopes its training events eventually will seamlessly integrate a range of learning activities:

- Live events (both ILT and on the Web)
- Live demonstrations
- Self-paced demonstrations and lessons
- Hybrid live and canned events pushed to the user’s computer
- Peer review and collaboration
- Mentoring

Although most training needs are complex, this demonstrates an extreme example. Blended solutions, for Wayne Hodgins, director of Worldwide Learning Strategies for Autodesk, is not only about training delivery but about integrating working and learning — learning as part of the work life. His focus is on continuous human performance improvement. The Autodesk Learning Assistant and blended learning solutions it enables demonstrates how this vision is being realized today.

Table 3 summarizes some of the conditions and considerations that suggest various delivery options and Autodesk’s ultimate blended solution.

Table 3 Summary of Autodesk’s Conditions and Options								
	Condition	Consideration	Delivery Option					
			ILT	Text	HBI	LBI	CD	WBT
Content	Procedural, conceptual	Changeable content		•			•	•
Learners	Diverse, dispersed heterogeneous	Async, sync, modular		•		•	•	•
Technology	Available, mixed					•	•	•
		Chosen solution				•	•	•

Conditions suggest this solution = •
Source: IDC, 2000

What’s the Right Answer?

According to Kevin Eames of ExecuTrain, “It is important not to discount any delivery Constantly look at how you bring them all together. If you are not equipped in every delivery method, you can not deliver training most effectively.”

Additionally, most industries are moving so fast that a single training solution will soon be overwhelmed by change. Teri Hampton of Countrywide suggests, “Plan in advance where you want to be in two years, because you will be there in less than half that time.”

Although the choices seem overwhelming, there is assistance and support available to help make good choices. In the end, training is about increased performance for the learner, either as an employee, a supplier, vendor or customer. Wayne Hodgins of Autodesk believes companies must “focus on continuously increasing the productivity of the individuals they seek to serve... not just on the tools and technology being used.”

Conclusion and Recommendations

For most companies, a single delivery “channel” for training is inadequate to satisfy all the training needs of the full range of target learners.

Adult learners bring experience to the table that is often directly relevant to the effectiveness of the class they are attending.

The goal of a training program is to ensure that 100% of the target learners get trained. This means, in most cases, a training plan must account for differences in content, learners, and access to technology.

- The type of content can determine the kinds of learning experiences most appropriate for particular learning objectives and the delivery mode for the training
- Learners’ needs can determine the mode (synchronous or asynchronous) and the importance of a modular training solution.
- Access to technology impacts the decision for a single or multiple delivery options.

When combined with live training, a blended solution of self-paced training and technology delivery offers an effective, convenient, and flexible solution to a wide range of training needs. Analysis and reflection on the content, the learners, and the available technology help clarify the possible alternatives and make the selection of a blended solution most appealing.

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