

# Linking learning to business

Research Report 2004

Laura Overton

## ABOUT THE AUTHOR

**Laura Overton** is an independent consultant with over 17 years experience in the e-learning and distance learning industry. She has worked with many early adopters of e-learning helping blue chip organisations develop sustainable business strategies for e-learning through her roles at leading e-learning organisations – NETg and SmartForce (now SkillSoft). Laura is a regular speaker at conferences and seminars, is a Fellow of the Institute of IT training and has a degree in Maths and Psychology.

For further details please visit [www.lauraoverton.com](http://www.lauraoverton.com).

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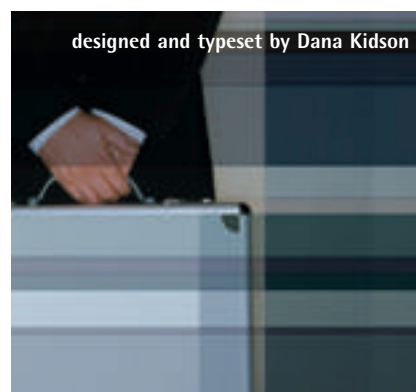
# LINKING LEARNING TO BUSINESS

A study of the practical business considerations required for  
sustainable e-Learning success in Europe

January 2004

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# INTRODUCTION

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## Aims and purpose of study

In today's economic climate business challenges include speed of change, quality, customer retention, revenue growth and cost reduction. Originally marketing hype claimed that e-learning would meet these critical needs, and more.

Yet a few years on, many expectations have not been met. Research shows that up to 60% of e-learning implementations failed, despite improvements in technology and content development and increased knowledge and awareness. Quite rightly organisations are carefully re-considering the role of e-learning and the true value that it can deliver.

So what is the role of e-learning today? Can e-learning help bridge the gap between learning and business?

To help answer these questions, we propose that our experiences are considered from a different perspective: if 60% of implementations are reported to have 'failed' then 40% of organisations have 'successfully' exploited e-learning techniques and technologies to make meaningful contributions to business success.

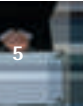
This research analyses the common experiences of organisations across a range of sectors – see section on participant selection below. All of the organisations are established e-learning users and who generally believe that their e-learning initiatives have been a success and have demonstrated value to the business.

## Basic research question

What are the common business factors that contribute to e-learning success within European organisations?

## Topics investigated:

1. Defining (e)learning success for an organisation
  - What are the measures of success?
2. What change management processes have been used?
  - Developing stakeholder commitment
  - How to gain executive support
  - Creating and leveraging quick wins



3. Pragmatic approaches to integrated learning
4. The role and impact of marketing for learning

## Research Methodology

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### Participants

Fifteen organisations took part in the research from a range of sectors including government, financial services, IT, telecommunications, insurance, retail, manufacturing, consultancy services and transport. See appendix 1 for participant profiles. We sought to identify diverse organisations that were perceived externally as having an established and successful e-learning strategy, directed and managed from the UK. A number of external sources were used to identify appropriate participating organisations:

- Recommendation by independent associations such as the Chartered Institute of Personnel and Development (CIPD), the e-learning alliance Scotland, and the Institute of IT Training.
- Organisations which had been nominated for, or won, industry awards.
- Established case studies with a high profile in press or at conferences.
- Recommendation by recognised, independent industry experts.
- Recommendation by industry suppliers.

The research gathered information from two groups within the participating organisations:

1. e-learning project sponsors – the owners of the e-learning strategy or projects.

Typically each organisation provided one project sponsor however, in some larger and more diverse organisations, two sponsors provided input into the research. Data from 17 e-learning sponsors has been included in this research

2. e-learning users within the organisation.

The e-learning sponsors were asked to distribute an online survey to a sample of users within the organisation that was representative of their business audience. In certain circumstances, the survey was distributed to a wide audience, e.g. the full e-learning audience in the last 6 – 12 months, to gain a representative sample ( return rates were between 25 – 45%). In other organisations, where the survey could not be distributed extensively, the representative sample was hand picked as a smaller group. In the latter group, return rates were 50 – 100%. A total of 2,112 completed surveys were used in this research across the 14 organisations.

### Data gathering

The data was gathered from three sources:

- Online survey for sponsors and users (all user responses were anonymous). A word version of the survey was also provided for those without online access. See appendix 2 for online surveys.
- Face to face interviews with all e-learning project sponsors and face to face focus groups or phone follow up with selected user groups. See appendix 2 for interview schedules used.
- Supporting documentation (e.g. internal surveys, marketing campaigns, business plans etc).

### Survey Pilot

Prior to distribution, the online surveys and interview schedules were piloted with the following individuals to ensure

integrity, usability, clarity and appropriateness:

Michael L. Nieto is currently MBA programme leader at Bournemouth University. He has published academic articles on Human Resources and is currently commissioned to write a second management textbook.

Nige Howarth – Director of Inspired Age with over 30 years experience in IT and training, specialising in the impact of technology based training on individuals and organisations.

Mark Harrison – Head of Consulting at Epic with over 18 years experience in helping organisations to introduce and use technology-based learning solutions

### **Limitations**

This research particularly looks at sponsor and learner views within organisations who are established e-learning users and we do not claim that the survey responses are indicative of all potential e-learning users in similar organisations.

In addition, every effort has been made to ensure that the users involved in this research have been selected as representative of typical audiences within the participating organisations. However, given the anonymous nature of this survey and the size of the participating organisations, we cannot claim that the data is representative of all employees in those organisations towards e-learning. It does however give an indication of views at this point in time.

This report is focussed on the business systems surrounding the introduction of e-learning rather than the technologies, technology prerequisites or the effective instructional design. The technology and design aspects have been covered in greater depth in other studies.

### **Definition of e-learning**

For the sake of clarity, the general term 'e-learning' used in this research represents the following:

- Any electronic form of delivering learning content ( e.g. online courses, CD courses, virtual classroom, online mentoring etc)
- It also includes programmes where e-learning content is part of an overall training package, mixed with face to face and/or on the job training
- Please note, rounding errors means that not all tables will add to 100%



# EXECUTIVE SUMMARY

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This study set out to identify the factors that contribute to sustained e-learning success and looked at a number of businesses with three or more years of e-learning experience and an external reputation for demonstrating best practice.

15 businesses participated across a range of diverse organisations within the UK including PricewaterhouseCoopers, Unisys, Unipart, BOC, NHS, Cable & Wireless, B&Q, BA. Data was gathered from both the e-learning sponsors and over 2,000 representative users within those organisations using online surveys supported by interviews with the sponsors.

The external reputation for success was substantiated by the overwhelming evidence provide by the users within this study:

- 90% of those surveyed would recommend e-learning to a co-worker
- 91% say that it is important to have e-learning as a choice in their learning options
- 90% state that following e-learning they are able to use the points in their work

The study looked at a number of areas to determine the common factors across the organisations that contribute to this success and could be replicated in other organisations.

## Key findings

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### e-learning tools and technologies

Diverse content sources are critical to sustainable e-learning, with organisations using a mix of externally sourced generic and bespoke content, supported by an increased use of rapid development tools to create content internally. Virtual classroom is planned by 94% and content and future investment in online support mechanisms expected in the next wave of implementation. Whilst tracking is essential, enterprise wide Learning Management Systems are not always necessary.

### Alignment to business strategy

Organisations invest considerable resources to align services and programmes to business strategy wherever possible with 94% using business drivers to establish urgency for e-learning strategy. Outsourcing parts or all of the e-learning delivery allows internal staff to focus on internal business needs. The diverse business drivers behind e-learning strategies

reflect the unique needs of each business. Cost saving with e-learning is considered one of the benefits rather than one of the drivers

### **Business influence has more impact on e-learning success than training influence**

75% of the top stakeholders considered to influence e-learning success sit within the business itself (e.g. board executives, managers, project leaders, learners). 55% of learners considered that line managers offer the most important influence on their e-learning behaviour followed by peer recommendations (23%), training professional opinions were only considered influential by 13%. Generally this was recognised with organisations demonstrating a variety of strategies to engage management with the learning process

### **Embracing organisational culture to change learning behaviour**

Whilst the business cultures of the organisations and attitudes to learning and learning investment varied widely across the organisations, the sponsors found creative ways to leverage the existing cultures within the business to position e-learning and to encourage usage.

### **Capture attention early**

100% of the organisations believed it was important to demonstrate quick wins early in the implementation process – they actively identify appropriate indicators of success for each stakeholder community.

### **Understanding learner motivation**

Recognition of e-learning achievements is important to users but is not frequently built into learning programmes. Equally course completion is more important to learners than to sponsors indicating that learners consider e-learning as part of their formal learning offering rather than informal learning. Whilst choice of time and location is offered to learners, they prefer to learn at the desk and in work hours.

### **Defining measurement**

Most organisations worked with the business leaders to define learning expectations and outcomes at the start of projects. This encourages business ownership and creates framework of measurement. Measurement of learning outcomes was not systematic but all used technologies to gather learning data for levels 1 – 3 of Kirkpatrick.

### **Support is not an optional extra**

A range of learner support mechanisms were used by all organisations for both technical and learning support. 41% involved management in learner support and to encourage application of skills on the job. Many planned to increase use of online support mechanisms such as e-mentoring in the future. Support processes were also implemented for managers and local e-learning champions positioned within the business.

### **Blended learning – classroom is not always in the mix.**

E-learning has been successfully integrated into the majority of training offerings. Classroom components however are not always considered essential for each programme, blends of e-learning options alone are more prevalent in Health & Safety and IT than blends of classroom and e-learning.

### **Communication strategies**

Heavy investment in creating two way communications strategies with all stakeholders is evidenced across the board with marketing techniques such as branding being used effectively to reposition learning within the business.

## **Conclusions and recommendations**

Sustainable e-learning strategies are not driven by technology and tools but by developing a clear understanding of how learning will support the business goals and aspirations of the stakeholders within the business. This alignment of learning and business requires investments of time and resources but it provides the context of learning and ensures relevance critical to ongoing success.

Appropriate selection of e-learning tools and techniques to create the learning is also important – one size does not





fit all and one e-learning tool such as a generic library or virtual classroom will not fit all learning needs. Simple technologies such as e-mail also have a role to play in the mix.

Whilst e-learning technologies and methods encourage an informal approach to learning – just in time, modular bite sized chunks, the evidence suggests that learners prefer structure and recognition in their learning processes (perhaps a legacy of traditional schooling and training) suggesting that further support may be needed to help learners e-learn in a more informal setting.

Business engagement is the glue that drives the strategy forward. Several strategies were identified to encourage business ownership at all levels including the co-development of appropriate measurements. Communicating results effectively at all levels is an important contributor to sustained e-learning success.



# CHAPTER 1

## Findings and Analysis 1 – Participant Profiles and e-learning trends

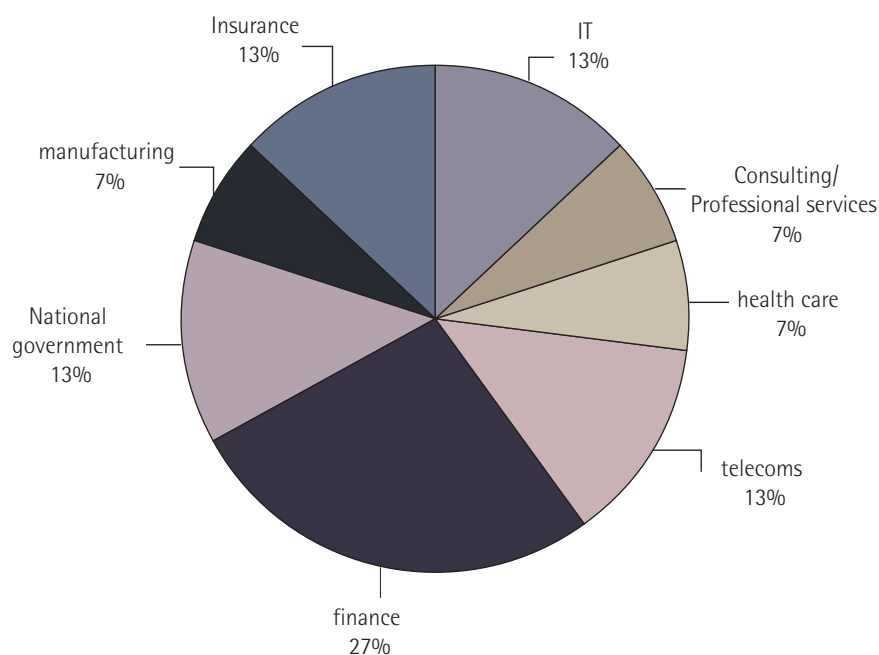
This chapter provides an overview of the participating organisations and users and outlines the e-learning tools and techniques that are currently in use.

### Demographics of participating Organisations

#### Organisation Profiles

The 15 organisations involved in this study were deliberately chosen to represent diverse industries, sizes and audience locations. Figure 1.1 outlines the industries involved in the study, figure 1.2 the number of employees and 1.3 the audience location profile.

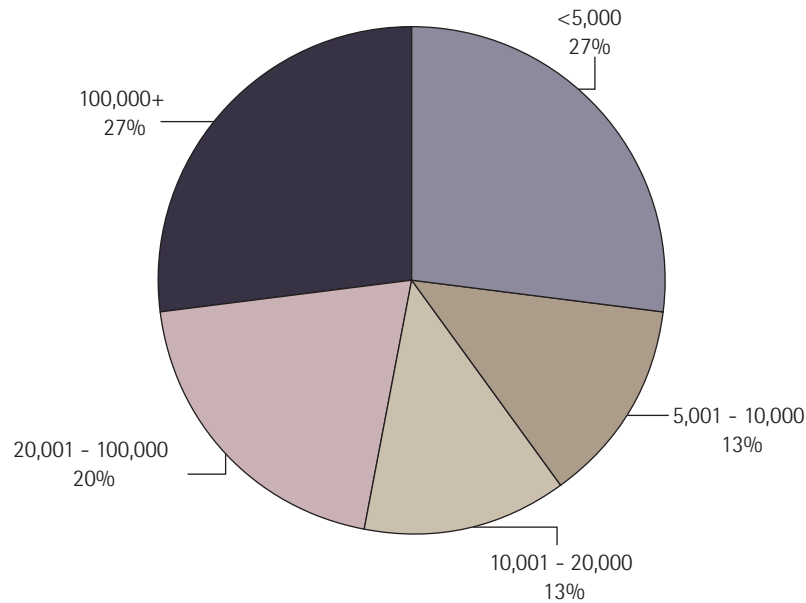
**Fig 1.1 Represented industries**



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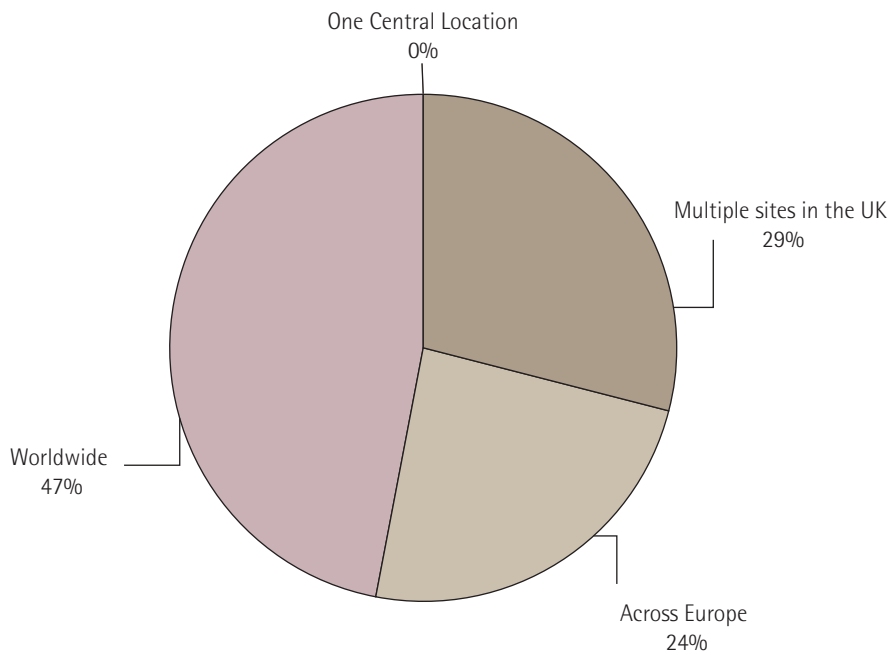
**Fig 1.2 Number of employees**



A pie chart illustrating the distribution of participant organizations based on their employee count. The chart is divided into five segments, each representing a different range of employee numbers and its corresponding percentage of the total.

Employee Count Range	Percentage
<5,000	27%
100,000+	27%
20,001 - 100,000	20%
10,001 - 20,000	13%
5,001 - 10,000	13%

**Fig 1.3 Audience Location**



A pie chart illustrating the distribution of audience locations. The chart is divided into four segments, each representing a different location category and its corresponding percentage of the total.

Location	Percentage
Worldwide	47%
Multiple sites in the UK	29%
Across Europe	24%
One Central Location	0%

The diversity in selection of the participating organisations is intentional as the study looks to identify the common business practices that can be applied to successful e-learning strategies regardless of industry or profile.

The common selection factor between the audiences is that they have all used technology based training for over three

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years (12 organisations over 5 years), 13 of the organisations have been using the web for over three years (four organisations were very early adopters of web based learning and have been users for over five years). This extended length of technology based experience was considered essential in the study as we sought to identify ongoing issues of sustainable e-learning strategies and how they adapt to changing economic and business needs.

## Who owns e-learning?

The extended debate of who should own and direct e-learning strategy was reflected by the position of the sponsor's department within their organisations. In total 17 e-learning sponsors were interviewed across the 15 organisations.

Eight of the e-learning sponsors interviewed belonged to corporate HR in a centralised training function that supported the whole business. The common benefits cited were the ability to leverage resources and build and share best practice. However many of the e-learning sponsors indicated that their centralised HR position could often hinder the effective implementation of learning. They were considered removed from the business and often extended considerable effort in overcoming the business perception that HR is locked in an ivory tower.

Five of the e-learning sponsors sat within the business units themselves either as a local HR or training function or within units such as marketing. These sponsors perceived their position within the business as essential to their ongoing success as they were able to support business goals and involved in business decisions from day one. The down side was the lack of overall strategy for leveraging tools such as a Learning Management System (LMS).

The final four sponsors were involved in a specialised e-learning service that supports both local business units and centralised functions who would use their services and be cross charged. These sponsors were often in competition with external suppliers but had invested in building a reputation of excellence internally. As a result, they were seen as the experts within the business, driving repeated requests for help and the spread of best practice internally. An interesting observation from two of the sponsors in this category after providing the service over a number of years was that the business was beginning to take good e-learning for granted. They are battling with the fact that some projects were now being developed from within the business without the external help of the specialist units which, in some cases reduced quality and has damaged the impact and reputation of e-learning.

## Outsourcing trends

Research by IBM<sup>1</sup> published early last year shed interesting light on the issue of outsourcing HR services. Despite an average cost saving of 11% for outsourced services, less than 20% of those surveyed outsourced more than three processes. The biggest single outsourced process was payroll. With the HR move from administration to planning, outsourcing of transactional processes eliminates repetitive and time hungry tasks, delivers cost reductions and frees HR professionals to provide value added services in house.

Whilst outsourcing of e-learning is not common across all of the participating organisations, it is significant that within these established e-learning users, over 50% of the organisations took advantage of increasing reach and reducing costs/ internal resources by outsourcing all or part of the e-learning strategy to a key partner – four businesses outsourced a significant proportion of the e-learning strategy including blended learning programme design and development, administration, management of suppliers, help desk and online hosting of LMS and content. This approach allowed the e-learning sponsors and training professionals to develop a more strategic approach towards learning within those organisations.

Others took advantage of outsourcing content hosting and basic LMS functionality offered by the major generic content players in order to reduce reliance on internal IT and to overcome internal intranet restrictions.

Those actively outsourcing components of the e-learning strategy generally reported a more strategic use of internal resources that allowed the internal IT and training professionals organisations to focus on alignment of learning with business objectives rather than the costly and time consuming administration of systems.

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## User Profiles

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2,112 representative users participated in the online survey. The female:male ratio was 38%:62%, the ages of the participants (fig 1.4) also varied but, by and large, both age and sex profiles of the audience reflected the demographics of the organisations represented.

**Fig 1.4 User participant age range**

A pie chart illustrating the distribution of user participants across four age ranges. The largest segment is '26 - 39' at 42%, followed by '40 - 54' at 39%, 'Under 25' at 11%, and '55 and over' at 8%.

Age Range	Percentage
26 - 39	42%
40 - 54	39%
Under 25	11%
55 and over	8%

In addition, 38% of the users had management or team leadership responsibilities.

**Fig 1.5 User participants main place of work**

A pie chart illustrating the distribution of user participants based on their main place of work. The vast majority, 86%, work in an 'Office'. Other categories include 'On site at a customer' (7%), 'Working from home' (5%), and 'On the road' (3%).

Main Place of Work	Percentage
Office	86%
On site at a customer	7%
Working from home	5%
On the road	3%

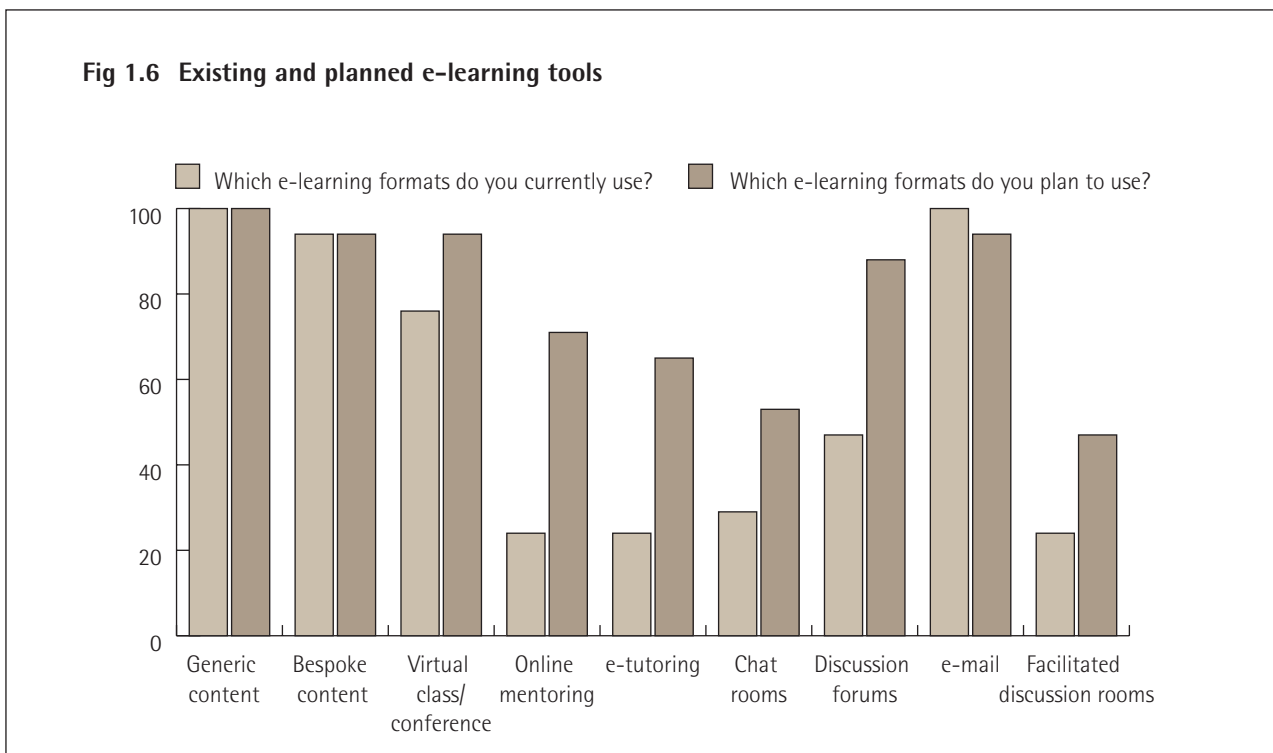
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100% of the users used computers in their job and 86% of them spent most of their working day at the office (see fig 1.5) , these figures however would not be typical for all of the organisations and the e-learners within those organisations. They are more likely to reflect the fact that those with desktop access to the web would have more opportunity to access the survey.

It should be noted that this research is not specifically reviewing and commenting on the opportunities to access technology and the subsequent impact on e-learning acceptance within an organisation. It is widely accepted that technology access is a critical indication of the potential for e-learning success therefore the fact that these participants have access to technology is expected given the long term usage of e-learning within their businesses. The high percentage of office workers who responded in this study should be taken into account when considering the findings.

## What e-learning tools are in use?

The e-learning sponsors were asked to identify what e-learning tools were currently in use and which e-learning tools were planned for the future. See figure 1.6



100% of the organisations used generic content in some form and were planning to continue to do so which is significant given current arguments surrounding the value of generic content versus tailored learning solutions. This high percentage could be linked to the fact that these organisations have been e-learning for some time and when they started, often the generic libraries were the first port of call due to lower costs and immediate availability. Bespoke learning has increased in profile and accessibility in recent years, yet these existing users all plan to continue use of generic libraries indicating their continued value in the e-learning armoury.

94% of the organisations use and continue to plan to use bespoke content, created either in house or externally to meet specific organisational or cultural needs. It appears that the argument for established e-learning users is not one of build or buy when it comes to choosing content but build and buy – with the decision being made according to the project, timescale and resources available.

Another finding across the board is that all organisations are using some form of collaborative e-learning tool and are planning to increase their use. Virtual classroom is already used by 75% of the organisations and is expected to be used

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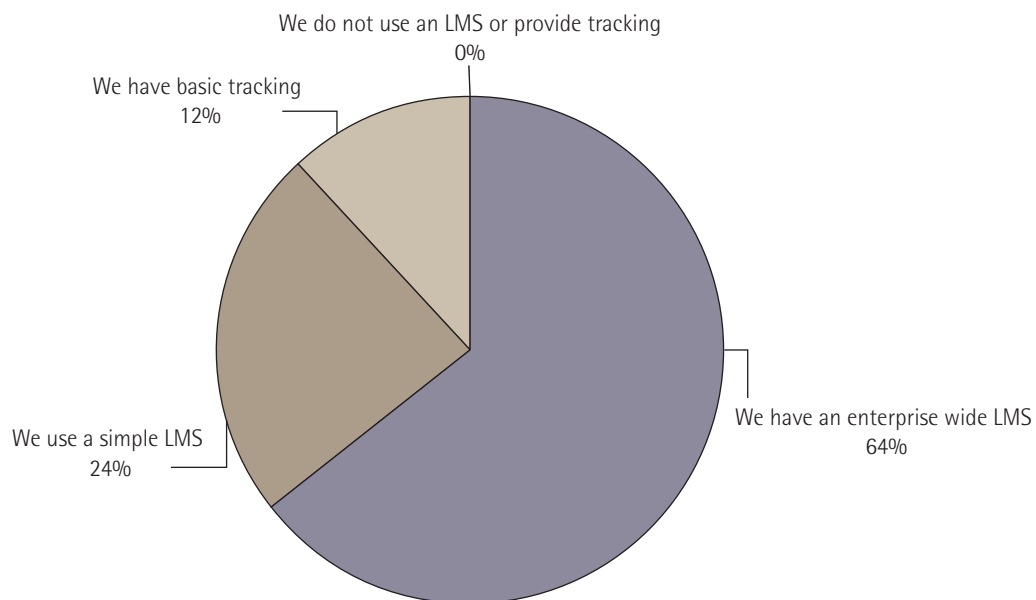
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by 94% of the participating organisations in the future, online mentoring is planned by 71%, e-tutoring by 65%, chatrooms by 53% and facilitated discussion forums by 47%.

It would appear that the participating organisations have focussed initially on content as a priority within their strategy and, now that this is established, the future focus will be the support mechanisms surrounding the content and the reduction in the use of e-mail as a primary means of online communication.

The research findings also indicate all organisations believe it is important to have some form of online tracking. However, it is important to note that not all of the businesses feel that it is essential that an enterprise wide LMS is at the heart of the e-learning strategy. Fig 1.7 shows that although 64% of the organisations use an enterprise wide LMS, 36% use either simple tracking or a basic LMS tool, that has been either developed in house or is part of a the content vendor's solution.

**Fig 1.7 Have you introduced a Learning Management System (LMS)?**



A pie chart illustrating the distribution of Learning Management System (LMS) usage among participating organisations. The chart is divided into three segments: a large dark blue segment representing 'We have an enterprise wide LMS' at 64%, a medium brown segment representing 'We use a simple LMS' at 24%, and a small light brown segment representing 'We have basic tracking' at 12%. A fourth category, 'We do not use an LMS or provide tracking', is listed as 0% but has no visible slice in the chart.

LMS Category	Percentage
We have an enterprise wide LMS	64%
We use a simple LMS	24%
We have basic tracking	12%
We do not use an LMS or provide tracking	0%

The key business drivers for the e-learning strategy determined the focus that each organisation has on the importance of an enterprise wide LMS – where the key drivers include reduction of administration staff and increased reliance on a self service approach to learning, the enterprise LMS becomes a central component.

The study indicates an increased tendency for the participating organisations to have the facility to develop e-learning in house and 53% of the organisations are already using in house development tools such as online testing, rapid content development tools such as Macromedia breeze or are developing their own templates internally. A further 29% are planning to do so in the future (see figure 1.8).

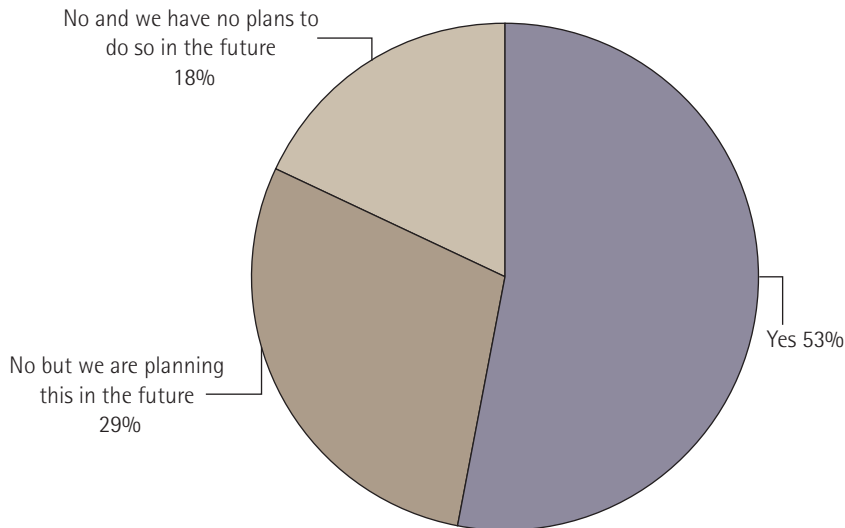
This increase is being driven by the need to create customised content quickly and cost effectively and the resulting programmes are often used as quick stop gaps addressing processes control. Importantly they are considered as part of the overall mix of e-learning tools rather than in isolation.

When reviewing the history of e-learning development in the interviews with the sponsors, the initial focus for all the organisations was the development or purchase of e-learning content. Typically LMS functionality and improved tracking came in a second wave as the e-learning strategy progressed with the emphasis on support now taking

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increased focus for 2004. These stages reflect the availability and stability of differing tools and technologies over the time period in question but they do not take away from the solid foundation that content has provided in the sustainable success of the e-learning strategies.

**Fig 1.8 In house development tools**



## Summary of Key findings

- E-learning success is not restricted to industries or audience sizes. It has the capability to address diverse needs and environments
- Outsourcing certain e-learning components allows internal staff to focus on company specific drivers.

## E-learning tools - Four trends

The most significant trends are:

- Content is a bedrock of sustainable e-learning endorsed by the diversity of content options available – not just generic or bespoke but both, enhanced by the increased use of in house content development tools.
- Virtual classroom is widely used in the e-learning mix as both a content and support option.
- Some form of tracking is critical but use of enterprise wide LMS will be dependant on business requirements rather than as an essential element of e-learning strategy.
- Broader use of online support mechanisms are planned by the majority in the future as staff become increasingly familiar and technology applications more suitable.

### FOOTNOTES

1. IBM Global Human capital survey [http://www-1.ibm.com/services//bis/hucap\\_survey.html](http://www-1.ibm.com/services//bis/hucap_survey.html)



# CHAPTER 2

## Findings and Analysis 2 – Creating firm foundations

This chapter looks to identify common trends that are the fundamental foundations of ongoing success by reviewing how the organisations started on their e-learning journey.

It considers the drivers behind e-learning investment. To what extent is learning integrated with general business and HR processes? Who are the main influencers in ongoing e-learning success? How did they get started? What obstacles did they encounter and address along the way?

### e-learning drivers

The e-learning sponsors within the organisations were asked: why did your organisation consider e-learning and what factors were important in your decision to implement e-learning? The anecdotal responses fell into a number of categories outlined in table 2.1:

Table 2.1

E-LEARNING DRIVERS	EXAMPLES
1. Speed	<ul style="list-style-type: none"> <li>• The need for rapid deployment to meet faster demands of business</li> <li>• Reducing learning cycle times</li> </ul> <p>E.g. Unipart reduced its micrometer course down from 6 hours to 1 hr, B&amp;Q Health and safety is now reduced to 1 hour in store from 4, BOC reduced a core programme from 5 to 2 days.</p>
2. Consistent Quality	<ul style="list-style-type: none"> <li>• To provide an undiluted message – particularly relevant for compliance and health and safety training.</li> <li>• Consistent messages which will increase quality of learning around the globe</li> </ul> <p>BOC found that quality and reliability of trainers could change around the globe, e-learning resources for trainers now ensure consistent learning regardless of location</p>
3. Availability	<ul style="list-style-type: none"> <li>• Increase access to knowledgeable experts</li> <li>• Reaching disparate audiences:                             <ul style="list-style-type: none"> <li>– Global audiences requiring quick access to latest learning e.g. at PwC, Unisys</li> <li>– Connecting dispersed audiences (e.g. within branches of RBS)</li> </ul> </li> </ul>

continued on page 20 ▶▶

Table 2.1 Continued

E-LEARNING DRIVERS	EXAMPLES
4. Increasing Relevance	<ul style="list-style-type: none"> <li>• Moving away from a catalogue of courses by using technology to promote link learning and job competency (e.g. at Unisys)</li> <li>• Provide knowledge in context of current role and future career e.g. BA</li> </ul>
5. Rationalisation	<ul style="list-style-type: none"> <li>• Need to reduce administrative staff costs</li> </ul> <p>Particularly relevant influencer for LMS strategy – C&amp;W reduced training team by approx 90%</p> <ul style="list-style-type: none"> <li>• Rationalise disparate training functions e.g. at BT where technology underpinned introduction of BT Academy</li> </ul>
6. Visibility	<ul style="list-style-type: none"> <li>• The need to walk the talk has been a strong driver for technology providers (e.g. Cisco, BT, C&amp;W) as they need to be seen as leading edge and relevant.)</li> <li>• e-learning was seen as an important component for employee branding if they are to be perceived as employer of choice in order to enhance competitiveness (see chapter 7)</li> </ul>
7. Business and IT improvements	<ul style="list-style-type: none"> <li>• Improvements in technology – bandwidth, footprints, platforms and the fact that technology is generally more instinctive – all make access easier and, coupled with improvements in IT Literacy, e-learning benefits now have become achievable and has driven an increase in e-learning investment</li> <li>• The existing strategy to outsource HR was a critical driver in C&amp;W's implementation of an outsourced LMS service.</li> </ul>
8. Volume	<p>High volume of staff has made e-learning a necessity rather than a luxury:</p> <ul style="list-style-type: none"> <li>• BA has high volumes of staff not office based but still have company wide compliance requirements</li> <li>• NHS – hundreds of thousands of staff will need to prepare for the use of IT, central to government initiatives</li> </ul>

## Observations:

Two or more of these drivers were cited by each sponsor, but no single driver came out ahead indicating the importance of identifying the most relevant e-learning benefits for the unique needs of the organisation.

Cost effectiveness was an important benefit for most organisations but it was only cited as a key driver for those who were involved in substantial rationalisation projects.

Traditionally cited e-learning benefits were not highlighted by the sponsors as significant influencing factors – availability any time, increase in amount of learning available. Again, these may have been additional benefits but were not seen to be important goals to pursue for these organisations.

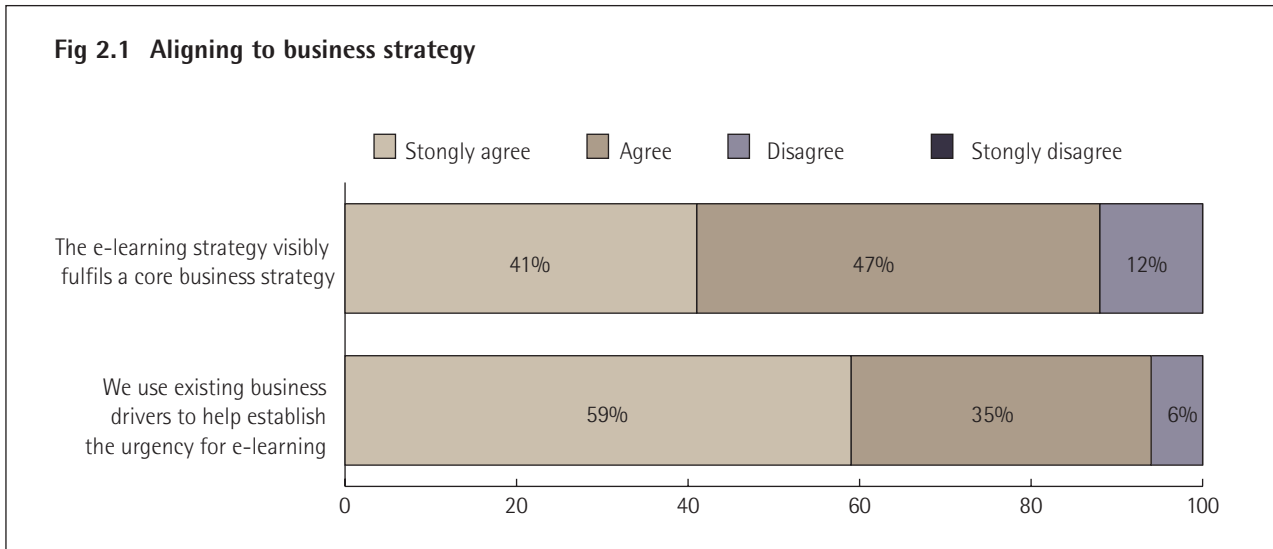
## Business Alignment

The study found that whilst the above benefits were important considerations when choosing technology as an option for learning, of equal significance was the business direction and strategy and the ongoing integration of e-learning processes into related business process.

## Aligning learning to business strategy

88% of the sponsors believed that their e-learning strategy fulfilled a core business strategy. More importantly, 94%

actively used the business drivers to establish the urgency for e-learning. Business alignment is an important element, not only in the design and development of e-learning but also in the communication and business buy in that is needed to support the strategy – see figure 2.1.



Anecdotal evidence from the e-learning sponsors highlighted the range of business strategies that they supported with e-learning – see table 2.2 for examples.

**Table 2.2 – aligning learning with business – some examples**

BUSINESS STRATEGIES	EXAMPLES OF SUPPORTING E-LEARNING PROGRAMMES
Increase sales	<ul style="list-style-type: none"> <li>e-learning helped BUPA launch a new competitive service faster to sales and management, allowing the organisation to respond faster to the market.</li> <li>Bespoke sales simulations were introduced specifically with the intention of increasing sales within business units at C&amp;W</li> <li>RBS offered online learning for Customer Services Officers – they measured lead generation before and after and found that it had increased across all branches.</li> </ul>
Talent management and people retention	<p>Attracting, building, using and keeping good talent is an important business strategy for a number of the participating organisations. E-learning has been used in a number of different ways:</p> <ul style="list-style-type: none"> <li>Increasing the number of certified professionals in Unisys and Cisco impacts both staff morale and customer perception</li> <li>Tracking of trained staff enables better resource management for large consultancy firms such as Unisys</li> <li>Unisys, BT and Unipart are just some organisations which have used the branding of continual learning (enabled by technology) as a means of attracting good staff in a competitive market</li> </ul>
Systems implementation and integration	<p>Implementation of business critical systems:</p> <ul style="list-style-type: none"> <li>Implementation of new systems e.g. BA used e-learning to train 11,000 users on a new booking system that replaced one that had been in place for 30 years</li> <li>In mid 2004 B&amp;Q will be using e-learning for just in time training for a new EPOS System.</li> </ul> <p>Integration of new systems following a merger:</p> <ul style="list-style-type: none"> <li>RBS was involved in a massive integration of IT systems following the acquisition of NatWest. The completion of the project was the fastest IT integration in Europe of its type to date with 60% of the learning completed online.</li> </ul>

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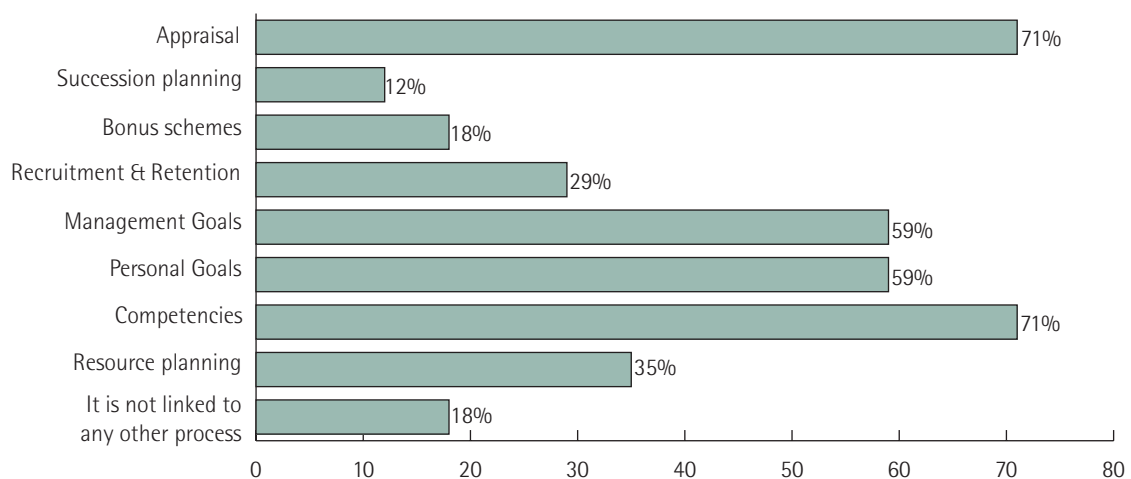
Table 2.2 – aligning learning with business – some examples continued

BUSINESS STRATEGIES	EXAMPLES OF SUPPORTING E-LEARNING PROGRAMMES
Customer support and loyalty	<ul style="list-style-type: none"> <li>• B&amp;Q's e-learning strategy linked to growth, turnover and customer service.</li> <li>• BUPA used e-learning when it found its customer support strategy changing from direct sales to phone account management as staff were initially unable to answer all questions that came in.</li> <li>• BOC uses e-learning to support customers by improving the ability of support staff to answer queries</li> </ul>
Driving and supporting organisational change	<ul style="list-style-type: none"> <li>• Marsh introduced a new business culture of personal performance management, using balanced scorecards as a business tool across the organisation. E-learning formed a critical component that allowed individuals to understand and apply the process to their jobs.</li> <li>• Modernisation agenda for NHS involved the increased application of technology across the service. Manchester NHS Agency and the NHS Information Authority are both using e-learning to build IT skills that will increase confidence and technology experiences across the NHS.</li> </ul>
Endorsing business values and strategies	<ul style="list-style-type: none"> <li>• At Cisco – e-learning is totally aligned to the organisation's e-business strategy – everything must use technology to drive productivity and flexibility.</li> <li>• PwC regularly use e-learning to endorse and strengthen business values in areas such as ethics, dignity at work, globally working as one firm</li> </ul>
Compliance	<ul style="list-style-type: none"> <li>• The increase in financial penalties for directors, reputation of organisations, and ability for external bodies to take corrective action has driven many of the organisations to e-learning to deliver the required skills across the business and to prove the actions taken.</li> </ul>

### Alignment to business processes

In addition to pro-actively supporting existing business requirements, the study indicated that 12 of the 15 organisations (82%) integrated e-learning tools and resources into HR and other business processes. Figure 2.2 shows the extent of this with appraisal and competency mapping being the most popular processes (71% linked e-learning with these internal processes).

Fig 2.2 E-learning is linked to the following systems/processes



59% linked to management and to personal goals ensuring that e-learning objectives are set within the targets of staff. Pro-active alignment to personal and business goals ensured ongoing attention and relevance.

18% ensure that e-learning goals and targets are linked to bonus schemes. Anecdotal evidence indicates that organisations do not use financial bonuses to motivate students as a norm as this may detract from learning as an ongoing activity. However bonus linked schemes do have their place in certain sales related training programmes such as product launches and work effectively as an incentive in these circumstances.

29% linked e-learning to recruitment and retention for example B&Q provide e-learning for all new store managers and team members prior to joining the company. This not only gets the managers up and running before arriving at the store but also establishes that e-learning is an important ongoing development tool both personally and for their staff.

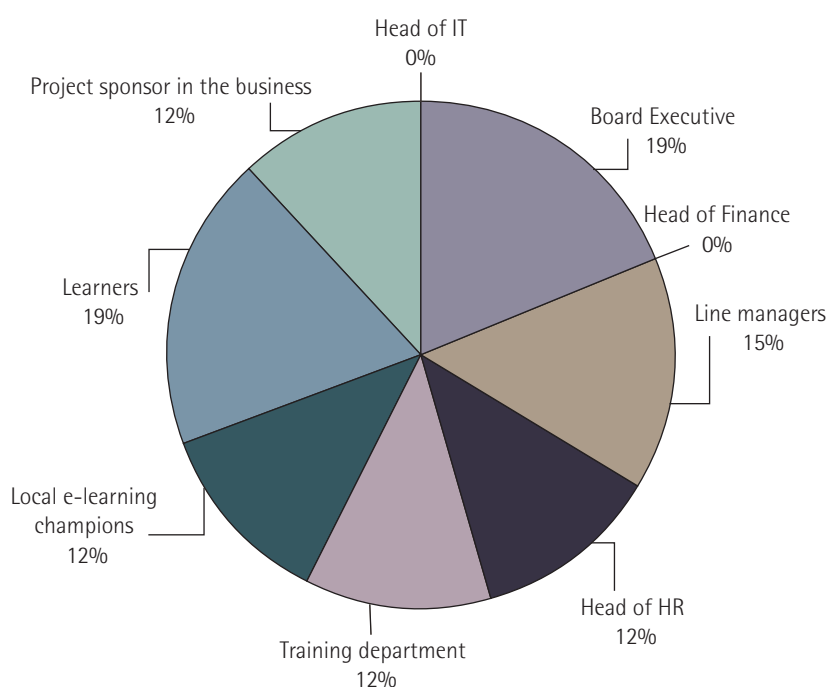
Figure 2.2 also shows that e-learning is not just linked to one process, each organisation links to an average of five processes. This indicates that the 'joined up' approach to e-learning and business integration further endorses the value and credibility of e-learning within each organisation.

### E-learning in action at Marsh – business alignment

Marsh is a leading risk and insurance services firm with 38,000 colleagues worldwide. Three years ago it implemented performance management – a global change initiative to encourage employees to own their own performance and achieve stretching goals that were linked to performance. The organisation implemented a balanced score card approach across the business to ensure that individual goals were strategically driven. E-learning was used to specifically support the individuals in the implementation of the new practices – courses provided information for managers and individuals on the actions that they needed to take and the processes to be followed. In addition the new LMS system and online learning further endorsed the culture change for individuals to own their own learning as part of their performance ownership.

### Key Influencers

Fig 2.3 Top stakeholders that influence success



The sponsors were asked to indicate the top three stakeholders in e-learning success for their organisation. Figure 2.3 continues the theme of business alignment – over 75% of the most important stakeholders were directly associated with the business units rather than centralised support functions (the 75% is fairly evenly spread between board executive, business project sponsors, e-learning champions, line managers and learners) and only 24% belonged to a training or HR function.

Interestingly the head of IT (traditionally the keeper of the technology platform) and the Head of Finance (keeper of the budget) did not appear in the top three influencers. This may be an indication that the e-learning strategy is now more established, the infrastructure by and large is in place and the up front spend is completed. It would be expected that these individuals would appear within the top stakeholders for organisations new to e-learning but given the length of experience of the participants, these results may indicate that IT and Finance are now already on board with e-learning.

Understanding and involving stakeholders appears to be at the heart of sustainable e-learning success within the organisations and this report will go on to outline the specific activities that have been implemented to engage the business stakeholders with e-learning. Chapter 3 focuses on activities in place to understand learners, chapter 4 looks at the role of manager influence and influencing managers. Chapter 7 looks more closely how stakeholders are engaged through communications and change management.

## Creating the business case

Participants were asked how important the business case was for their e-learning success. 73% of the participants used a business case some form to help engage key stakeholders (such as board executives and project sponsors) at the beginning of the e-learning project and on an ongoing basis as new e-learning initiatives are introduced. The business cases discussed typically had a number of goals:

- Clarify business requirements
- Provide a common understanding/vocabulary about how e-learning will address goals
- Outline timeframes
- Indicate business resources and commitments required (e.g. budget, time, staff on project)
- Motivate stakeholders for action
- Pool resources.

## DISTILLED WISDOM 1 – Creating the business case

- Present the business case in a business context
- Show how the project is a natural extension to current thinking within the organisation
- Link to existing projects e.g. outsourcing
- Identify appropriate metrics with the business and align business case to agreed metrics
- Ensure funding is specific for each business project
- Spread the cost of projects to clear bureaucratic hurdles (a number of organisations presented the full cost of the project in a number of chunks that were all within local sign off parameters)
- Work with IT to allocate e-learning infrastructure budget to capital expenditure.
- Consider the way that benefits are presented
- Ensure that the important e-learning drivers – speed, cost, consistency all wrapped in the language of business
- Link to drivers and needs and not technology
- Avoid training and e-learning jargon e.g. prerequisites, bookmarks, blended, e-learning, transcript
- Where appropriate, highlight reusability to show increased investment benefits E.g. Duplication of materials for customer use
- Use benchmarking from external research to demonstrate previous successes that will endorse requests
- Keep it short – use bullet points
- Give figures e.g.
- Learning costs reduction for distributed audiences

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Creating a business case did not involve a formal process for all organisations and in fact, many participants did not recommend a long extensive process. The format and style of the business case depends on budget required for the proposal, the culture of the business and the specific circumstances or culture of the business. Often the e-learning business case would form a logical extension to other business plans such as outsourcing, general learning, HR initiatives or IT rollouts.

The participants were asked what they included in their business case and how they presented it. The first of this report's Distilled Wisdom Summaries below outlines a number of quick hints and tips from the participating organisations on how to create a useful business case. (See Distilled Wisdom 1 page 24/25).

### Grabbing attention

A significant finding of this study is the role of the quick win within e-learning to grab attention of the influencing stakeholders. 100% of the participating sponsors agreed that it is important to deliver quick wins early in the e-learning implementation process. 88% of the organisation used the quick wins revealed through a pilot to demonstrate success as part of a larger rollout and 82% of the organisations agreed that it was important to plan and act in short intervals to deliver successes along the way. (see fig 2.4)

These findings indicate that the successful e-learning organisations not only look for early successes and results but also plan for them as they form an essential element of ongoing communication to ensure business engagement. In addition this process is ongoing for all new e-learning projects, they do not rest on the earlier successes to drive new initiatives.

### DISTILLED WISDOM 1 – Creating the business case (continued)

- For compliance training, outline the consequences of non-compliance – cost of investigations, management overhead, demonstration of impact
- Use analogies to make the point
- For example, when Marsh implemented its performance management and balanced scorecard course designed for rollout to all staff. It received immediate budget sign off when it highlighted that the cost to develop the materials would be the same as providing the tea and coffee alone in the classroom.
- Use shoe string approach to develop business case for e-learning, set expectations, start small and grow

Fig 2.4 Sponsor views on the quick win

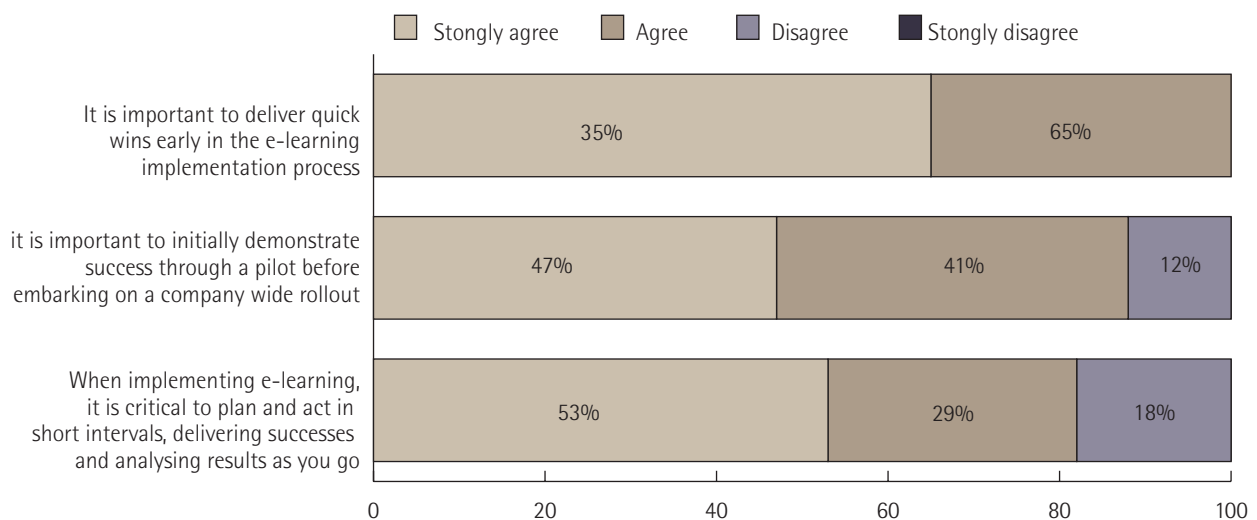


Table 2.3 outlines some quick wins that have grabbed stakeholder attention within the participating organisations. Note that the definition of 'quick' will be relative to the size of the project in hand!

## Overcoming obstacles

**Table 2.3 Quick win examples that grab attention**

<ul style="list-style-type: none"> <li>• BUPA generated immediate usage of the new LMS when it stopped all telephone bookings for classroom courses at the LMS launch. This forced learners to the site for traditional learning and as a result generated interest in additional online training services on offer</li> </ul>
<ul style="list-style-type: none"> <li>• B&amp;Q used the technique of reaching high numbers in a very short time frame to generate business attention. (It launched e-learning to 2,000 staff in 2 weeks.)</li> </ul>
<ul style="list-style-type: none"> <li>• E-learning visibility is dependent on ability to pick initial projects that are business winners e.g. BT and Cable &amp; Wireless both focussed on internet protocol and data awareness – a critical subject in telecommunications organisations. Induction is also another high profile learning area often used to launch e-learning as a concept. RBS used e-learning to facilitate essential IT migrations.</li> </ul>
<ul style="list-style-type: none"> <li>• Cable &amp; Wireless used generic content to provide a quick global rollout in multi languages which enabled them to generate a high profile for cost savings at management levels to help justify further investment</li> </ul>
<ul style="list-style-type: none"> <li>• Manchester NHS Agency worked with its supplier to survey initial users of its ECDL programme to assess the impact of the new qualification and published the results both internally and externally.</li> </ul>
<ul style="list-style-type: none"> <li>• The NHS Information Authority used an interim solutions from its supplier Spring IT, which provided an interim ECDL site for 15,000 staff which allowed it to demonstrate good results which were used at the launch of the primary site.</li> </ul>

### Initial barriers

The foundations of e-learning success in these organisations were not laid overnight and their progress resulted from a combination of planning, risk management (identifying and pre-handling potential barriers to implementation), and a flexible approach that allowed adaptation to new obstacles and ongoing business change.

The barriers to e-learning identified by the sponsors varied from organisation to organisation. This would be expected due to the diversity of the organisations involved: different attitudes towards IT and learning, IT infrastructure and the business priorities within each organisation all contributed to the variation.

Table 2.4 outlines the common obstacles identified across the study participants together with some of the solutions

**Table 2.4 E-learning barriers**

Barriers and Example solutions
<ul style="list-style-type: none"> <li>• Fear of technology and low computer literacy with learners           <ul style="list-style-type: none"> <li>Content design – Unipart focussed on simple navigation that is easy to use to address this issue</li> <li>Cable &amp; Wireless and B&amp;Q both created an e-learning introduction course to increase confidence and familiarity.</li> <li>In addition to its Learn 2 e-learn course Cable &amp; Wireless also introduced a specialist help desk</li> <li>Many organisations demonstrated the system at every face to face opportunity</li> <li>Manchester NHS Agency ensured that the introduction of e-learning was in a classroom environment</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>• Learner acceptance and changing preconceived ideas           <ul style="list-style-type: none"> <li>In order to increase acceptance among older audiences, RBS created high impact video scenarios which provided visual simulation so that the content did not look like online learning</li> <li>Cisco ensures that the very latest information is only available on e-learning which drives learners into the programmes if they want the best information around.</li> </ul> </li> </ul>

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Table 2.4 E-learning barriers continued

Barriers and Example solutions
<p><b>TECHNOLOGY ISSUES:</b></p> <ul style="list-style-type: none"> <li>• Inconsistent Technology access</li> <li>• Low bandwidth</li> <li>• Limited IT resources</li> </ul> <p>The following solutions were used by a number of the different organisations:</p> <p>PC Kiosks, access at home, CD</p> <p>Use pilots for proof of concept – work with both IT and with suppliers to deliver multiple routes through network jungle – content, design and delivery, choice of options</p> <p>Use web hosted services</p> <p>Combine intranet and local PC resources e.g. B&amp;Q run the LMS and online testing over the intranet but rich content is run locally.</p>
<ul style="list-style-type: none"> <li>• Management bottlenecks</li> </ul> <p>BOC puts management through the programme first to increase their understanding of the benefits which helped to reduce bottlenecks – see chapter 4 for additional guidelines on management engagement</p>
<ul style="list-style-type: none"> <li>• Unpredictable technology creates fear in the learning development team</li> </ul> <p>Keep content designs simple, build resilience into the programmes and keep navigation to a minimum.</p>
<ul style="list-style-type: none"> <li>• Fear that classroom will disappear</li> </ul> <p>Several organisations:</p> <p>Have increased the use of workshops and coaching to support e-learning</p> <p>Used e-learning to reduce time to learn and help learners and trainers gain time for other activities</p> <p>Use e-learning differently to classroom – e.g. short bites, fragmented, customer driven, crisis driven</p> <p>In order to specifically address fears of trainers, the NHS Information Authority believes that the only way forward is to model best e-learning practice with trainers themselves.</p>
<ul style="list-style-type: none"> <li>• No time to learn</li> </ul> <p>Content chunking</p> <p>Encourage breacktime learning</p> <p>Team leaders on board</p> <p>Help the businesses to schedule e.g.</p> <ul style="list-style-type: none"> <li>– Encourage local resource planners to schedule e-learning as a valid activity</li> <li>– Mandate the learning</li> <li>– Provide implementation support and guidelines within the territory (and make sure they are known about)</li> </ul>

that they used to reduce risk and increase the likelihood of success.

## Do obstacles change over time?

The participants have all found that the obstacles to e-learning success change over time rather than are removed altogether. Technology has become less of a barrier due to IT and content design improvements, hosting and the fact that multiple delivery sources are easier use.

Learner acceptance also appears less of an issue when organisations such as BT, Unisys or Cisco are offering over 60% of their learning online in some form or another.

Obstacles and barriers change over time and the following resistances are now more prevalent in a number of the participating organisations:

1. E-learning Fatigue Syndrome or 'Not another e-learning course' – has been identified by sponsors and users within

large organisations such as BT which is now extensively employing e-learning. The danger of perceived overkill is regardless of quality, availability or relevance of the content. The focus on blended learning, overall learning solutions and seamless knowledge management approaches may go some way to alleviate this. In RBS, after significant integration push in 2002, e-learning fatigue set in. It now uses focus groups to understand learner motivations and is finding ways of increasing creativity and fun within learning programmes and experiences. But it is tougher to do this as time progresses.

2. Preconceived ideas resulting from previous e-learning experiences can colour new initiatives

- When this occurs the classroom is still used to overcome prejudices as it brings learners together in a familiar setting in order to take part in a new experience.

3. Sheep dipping

- Due to the broad audiences of compliance learning, BT has had to overcome user expectations that e-learning is bland because it is just a 'sheep dip' or vanilla approach. To address this in more recent programmes, it is building flexible content (with up to 20 variants) to answer 'how does this affect me?' – see case study in chapter 4.
- Unisys addresses a feeling of sheep dipping by providing choice within limits, focus communication on self enrichment and job development.

4. Increased e-learning options create confusion

- BUPA used one brand to group all learning activities together under the name of Plato (Personal Learning and Training Opportunities.)

5. As learners become used to e-learning their expectations of content increase and organisations are looking to gaming technologies, increased use of broadband capabilities.

6. Learning solutions have moved on to incorporate a mix of different learning media. However in some organisations, learners do not always understand the implications of blended solutions and often believe that the e-learning component should address all of their needs which leads to failed expectations.

## Summary of Key Findings

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The successful e-learning organisations have a joined up approach between learning and business which creates the firm foundation for ongoing success. E-learning is not an isolated training occurrence tagged onto the training function.

The very heart of their e-learning strategies are business focused which provides increased stability and strength:

- Pro-active alignment of learning to business goals provides context for effective e-learning
- Integration of e-learning into HR practices
- Clear awareness of businesses influencers
- Learning is built and planned to show business benefits at the earliest stages
- Risks are identified up front and pro-active strategies to overcome barriers to ensure business adoption are included.
- Strategies remain flexible.

## E-learning in action at PricewaterhouseCoopers – e-learning in a business context

The Learning Technology Group (LTG) at PwC is a centralised team of experts who work with both the business practices and the learning and education teams to develop state of the art learning solutions for 120,000 staff worldwide. Whilst the local territories can make their own decisions regarding budgets and infrastructure, they look to LTG for advice and best practice.

The move to technology based learning was in response to the business requirement deliver consistent skills around the globe whilst minimising time away from the client. Consistent skills would provide a competitive advantage – a global staff working to the same standards and methodologies and all multinational customers receiving the same service regardless of location. Consistent skills also addressed the increasing legal and compliance requirements that the company faced.

PwC is amongst the earliest adopters of technology based training which was initially introduced over 18 years ago. At the time, the first programmes were business insight courses that provided case studies and simulations throughout the laser disc delivered learning. Now, whilst the LTG team have a number of very different tools and technologies to hand to create and deliver learning, it is their continued focus on building programmes with business sponsors around required business outcomes that drives their successful approach. LTG do not have a one size fits all approach to learning design. Their approach is to partner with their internal clients to define complex learning problems and then work through the issues, delivering high quality innovative solutions that meet the needs.

### Defining the business requirement with the business

PwC has a particularly well defined investment process that helps to clearly define the stakeholders in the project and their different roles in the learning partnership. Its investment proposal covers:

- The business case (outlining the purpose, benefits and business measurements, dependencies and assumptions)
- The learning (describing outcomes, audiences, learning structure)
- The project overview ( describing parameters, milestone planning, costs and risk management)

The investment proposal process involves stakeholders such as the full learning development team, the project sponsors and budget holders and is followed for all major e-learning investments.

### Learning content in a business context

Learning solutions developed are varied and flexible but always emphasise the business context in which the learning takes place. Several have won external e-learning excellence awards. A few examples include:

The GO Audit Basics programme for new hire graduates combines 8 online episodes and 43 integrated guides that enable transfer of the skills to the workplace. Context is provided by the emphasis on a strong case study, powerful characterisations and game style interactions. The approach is part of a blended solution that also includes peer group sessions, classroom simulation and technical training.

TREK – the tax research expedition for knowledge – also combines a number of training modules together with a day to day work tool to help researchers complete research memos. This project also includes the ability to tailor TREK to local territory requirements through the inclusion of territory examples, further aligning the learning to local business needs.

Management Bytes – a series of short (5 – 10 minutes) online interactive learning modules aimed at reinforcing previous learning on a just in time basis. Business relevance is ensured by links to useful

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## E-learning in action at PricewaterhouseCoopers – e-learning in a business context continued

resources, true stories and anecdotes with real PwC experiences and test yourself sections.

e-Risk is an interactive performance support tool, helping assurance professionals effectively assess risk associated with the client's e-business activities. As they gather relevant information on their customer and engage in their work, staff is offered multiple methods of learning in real time. In particular hyperlinks to supporting web pages were embedded within the online process of data gathering and risk analysis. At each stage, staff could click on a link attached to a particular term or process to understand – what is it? Why is it relevant to me and how do I do it?

All of the solutions are varied but all reflect creative ways in which the staff can learn in the context of their job roles. LTG also offers a number of other learning options (such as generic content libraries and virtual classroom technologies) to ensure that their offerings are as broad as possible for the organisation.

### Effective e-learning is not just about content

Staff on the LTG team also believe that the change management processes surrounding an e-learning project are as important as the content itself – they have produced implementation guides for launches working with the territories to understand specific needs, they encourage the use of learning champions and advise the business on effective implementation and communication programmes to ensure good usage. Communication of the early wins within the project is a high priority, particularly to project sponsors.

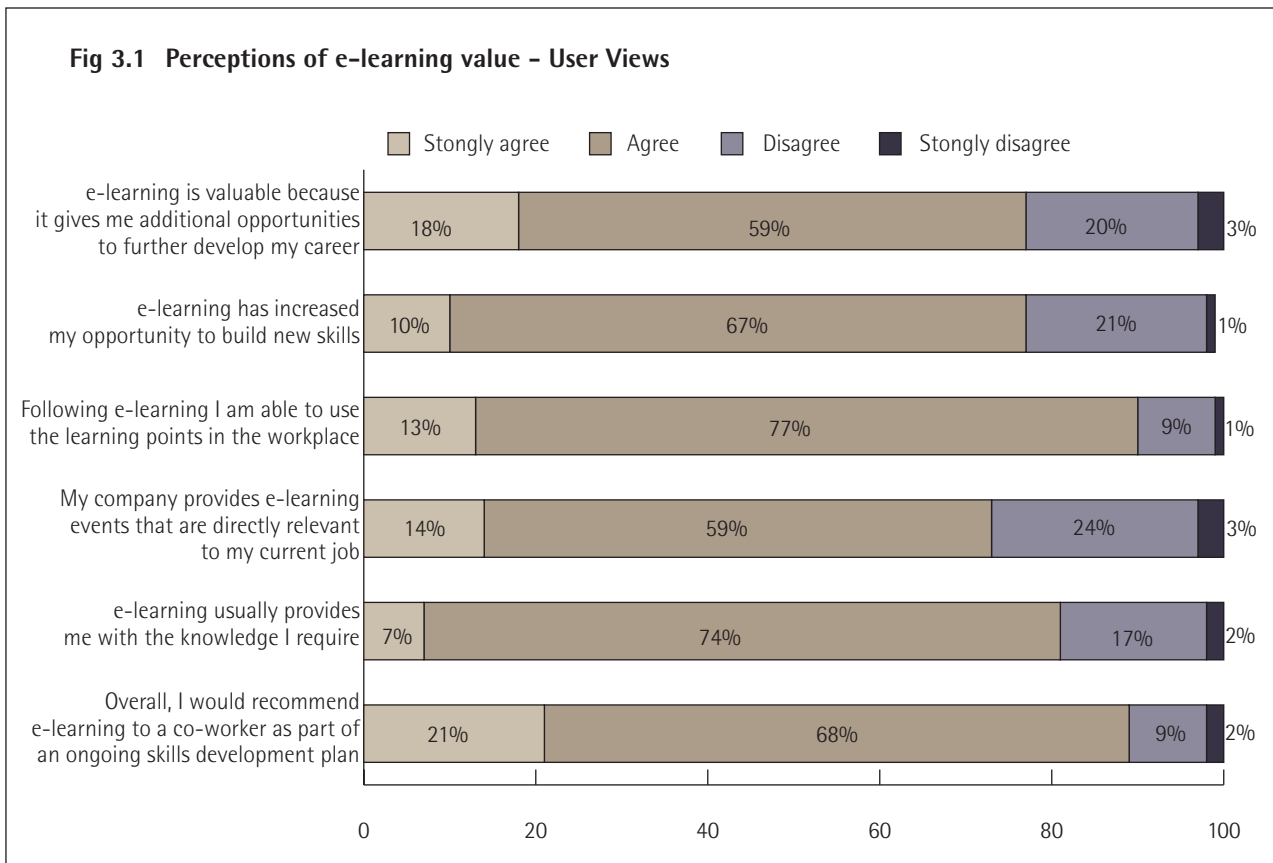
# CHAPTER 3

## Findings and Analysis 3 – Understanding learners

With the learners themselves significant stakeholders in e-learning success this chapter looks at e-learning from the learner perspective and the steps taken by the sponsors to ensure learner engagement through relevance and motivation.

### What do learners think about e-learning?

100% of the sponsors believe that it is important that e-learning is used to provide additional opportunities for career development and 94% believe that it is important that e-learning is used to build skills critical to the learners' current job. But do learners consider that the programmes are relevant to their jobs and self development? Figure 3.1 outlines the responses



In general user perceptions of e-learning are very favourable with 89% willing to recommend e-learning to a co-worker indicating that the experience is both useful and relevant.

90% of the learners were able to apply the e-learning to their current job role\* again indicating the degree of relevance within the e-learning programme and also the ability of e-learning to deliver transferable skills. Interestingly a lower figure, 73%, perceived e-learning to be directly relevant to their job role. This slight discrepancy may reflect the user's perception of e-learning in general or be an indication of the communication surrounding e-learning within an organisation. The higher percentage of learners who are able to apply the knowledge in their job could indicate that once the learner has made a specific choice, the relevance becomes more apparent.

The fact that 77% consider e-learning valuable for career development and 78% have been able to build new skills, not only shows the effectiveness of the e-learning experience but also that the sponsor's objectives of using e-learning to further develop career options is being achieved to a large extent.

*\* By comparison 95% of the learners felt that they were able to apply learning points from the classroom in their current role.*

## Ensuring Relevance

It is likely that the perceptions of user value and relevance outlined in fig 3.1 result from the strong emphasis that the e-learning sponsors place on business alignment and integration with other business and HR processes (as outlined in chapter 2). Emphasis on developing good quality courses for company specific processes, increased interactivity and meaningful case studies and interactions all help to ensure user relevance.

### Putting generic content in context

A significant bone of contention with users in some of the organisations is the fact that they are often faced with a large library of generic learning content under an LMS. Hundreds of courses are offered alphabetically and it is difficult for learners to identify what is needed or where to look despite having access to sophisticated search engines from the vendors. Company specific learning is easy to locate but finding relevant courses in a long list of generic titles was often cited as a bone of contention. A number of the participating organisations however have been pro-active in maximising their investment in generic content by putting it into a context that is meaningful for the learner and their job function as the following examples show:

#### E-learning in action at Unisys

Unisys has used generic content over a number of years but the advent of the Unisys University provided the opportunity to create role sensitive context in which to access the learning. As a result 75% of learning is now delivered online.

Unisys University offers competency based learning programmes directly to the users based around 400 identified job roles in the organisation. Previously, management approval was sought for all learning but now the emphasis is on the user to manage their own learning in line with business needs.

The initial and primary application of the University was to offer certification and technical training (subjects extensively covered by generic portfolios). Learners in Unisys are now able to log onto the university, identify their current job or next job move, assess their current competencies against required competencies and they are then presented with a programme that builds the competencies and certifications required.

The programme combines both generic e-learning and classroom training and supports the learner with online mentoring, additional resources such as online books and test preparation. The online environment of the University also includes a voucher system for classroom courses and certification testing so that the e-learning is part of a continuous learning process for the individual.

The University continues to evolve within Unisys and now includes leadership training, business and interpersonal skills. Generic content cannot always keep up with the pace of the industry so the Unisys University also have facilities to develop content in house where necessary.

## E-learning in action at Cable & Wireless

Cable & Wireless offers NETg content libraries through its LMS system which allows users to search for relevant courses. This is widely used primarily because this is the only source for some types of training e.g. desktop.

It has historically mapped generic content onto specific competencies for both management development and sales. Individuals developing in these areas could access content directly from the competency maps for their particular roles. Currently they are reviewing content in the context of a new behaviour framework to ensure relevance to future business direction.

Generic content from organisations such as SkillSoft has also been customised for use within C&W.

## Understanding motivation

### What motivates learners to get involved with e-learning?

100% of the sponsors agreed (71% in strong agreement) that understanding and developing learner motivation is a high priority in the implementation of e-learning solutions and outlined a number of routes in which they gathered learner feedback (see chapter 7). Learner engagement and learner motivation is one of e-learning's holy grails. Anecdotal evidence gathered in this study indicates a number of audiences generally believed to be receptive and not so receptive to e-learning. Table 3.1 summarises the general views gathered:

Table 3.1

MOST RECEPTIVE AUDIENCES	LEAST RECEPTIVE AUDIENCES
<p>Graduates – they are used to the media, familiar with self study</p> <p>Remote users are often positive as they are no longer left out (equally they can be resistant if technology is not supported)</p>	<p>Almost universally across the organisations both management and sales were considered to be the two toughest audiences to crack with e-learning!</p>

By and large however, audience types are not strong indicators of user motivation – many participating organisations had good stories to tell of management and sales engagement. The receptiveness of an audience is less likely to be dependent upon job function and more likely to depend upon:

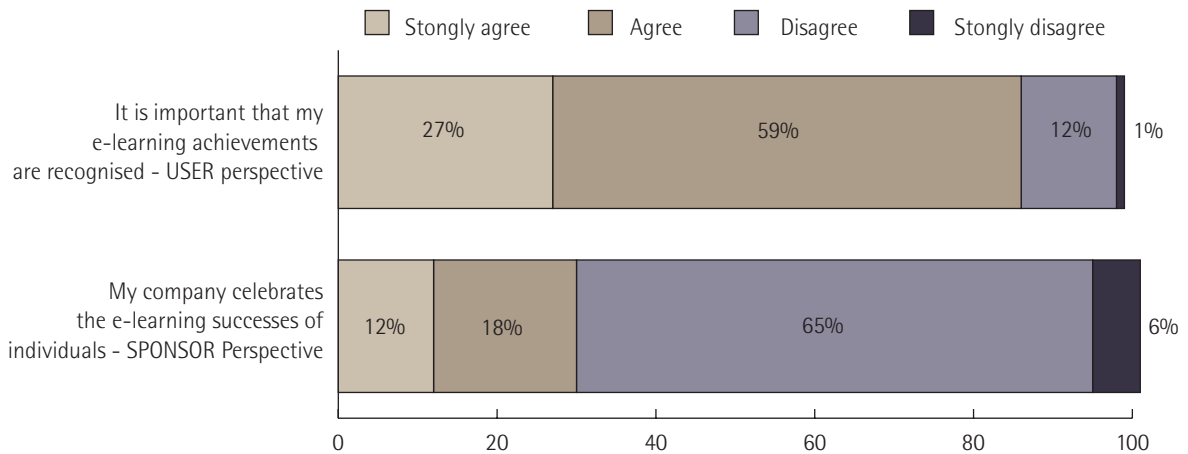
- The job demands the audience have for immediate skills upgrades
- Current training availability – those who had been operating in a training vacuum – reported by several organisations in this study – due to previous budget cut backs are receptive to e-learning as the vacuum creates a pull.
- The individual's personal interest in ongoing learning and development.

## Importance of recognition

One surprising finding from the research is the importance that learners themselves place on recognition of e-learning achievements. Figure 3.2 compares the view of e-learning sponsors and the learners.

87% of the learners who responded agreed that it was important that their e-learning achievements were recognised but only 29% of the sponsors had processes in place to celebrate e-learning success. This finding may indicate that whilst e-learning sponsors consider e-learning to be short, sharp, just in time chunks of training, the learners themselves still view e-learning as a full training option or classroom equivalent. They are looking for validation such as a qualification or internal recognition for any full programme completed.

**Fig 3.2 The role of recognition**



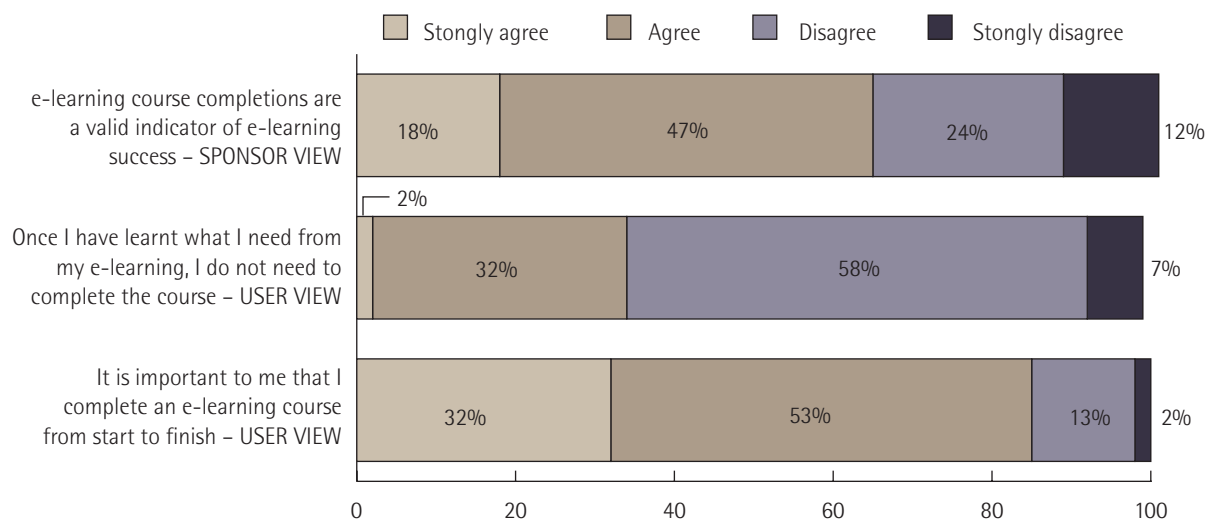
This is further substantiated when we consider the importance that learners place on completing an e-learning course (often a standard metric of e-learning success).

### The importance of course completions

Figure 3.3 shows that sponsor views vary on the issue of course completions as an indication of e-learning success. Only 65% believe that completions are a valid indicator of success. For example, BUPA takes the view that learning is valid if the users take the sections they need and ignore the rest. Whilst it tracks course completion (particularly for regulatory and compliance training), BUPA does not see this in itself as a measure of learning. Instead it looks at completion rates as more of a feedback on relevance of learning content and participants' enthusiasm. It pays more emphasis on tracking user numbers and repeaters as indicators of success.

Learner views on e-learning completion are far stronger. 85% believe it is important to complete an e-learning course from start to finish and only 34% believe that they do not have to complete a course once they have received what they need. These user responses are somewhat surprising given the flexibility of e-learning approaches but also may provide an important insight into user motivation and perception of e-learning.

**Fig 3.3 The importance of completing a course**



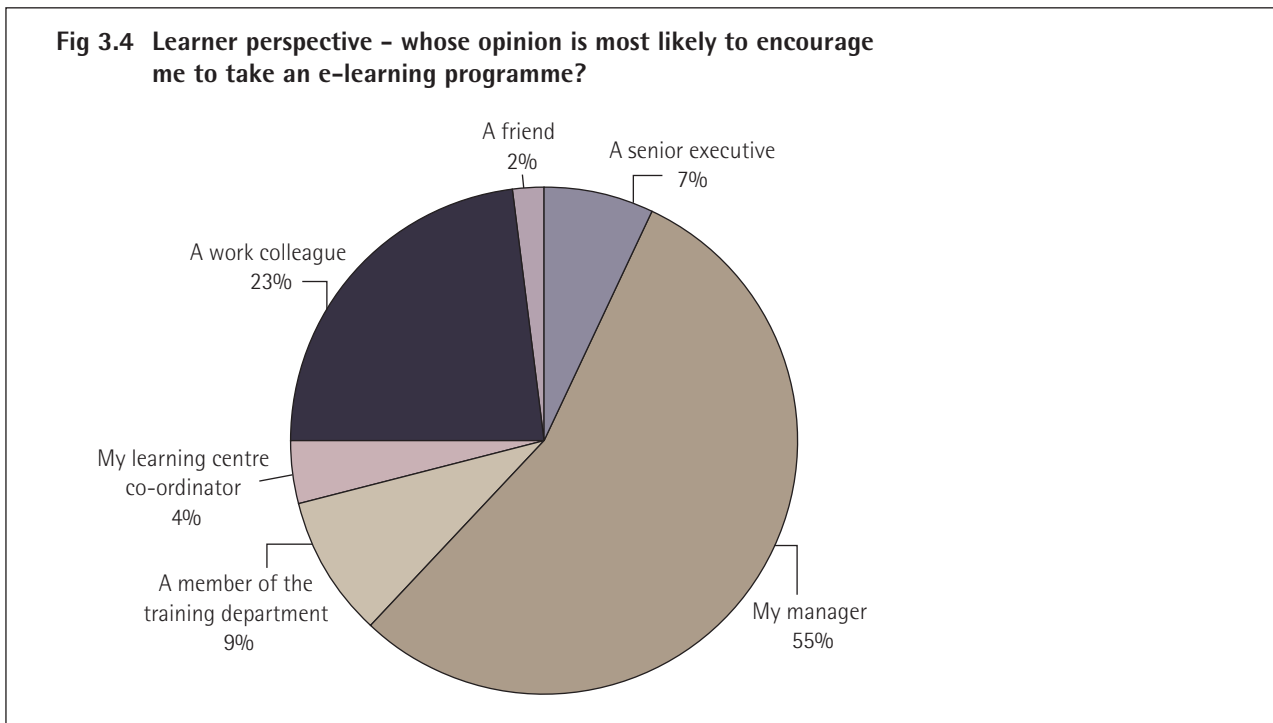


E-Learning specialists (both internally and vendors) discuss the merits of formal (as part of a structured training programme) and informal, just in time e-learning. Both are seen as having a valid place within corporate learning. The findings may indicate that learners are not making the same distinction between the formal and informal and look on all e-learning as a more formal process.

The strong emphasis users have for completion together with the desire for recognised achievement may also indicate a natural preference within learners for formalised e-learning programmes. This preference is counter intuitive to the increasing move of e-learning towards chunking the learning into bite size pieces. Students are raising a preference for structure, design, clear outcomes and recognition in their learning. Informal learning may have its place but the results indicate that currently learners perhaps do not recognise the informal process as part of their perception of being trained.

### Who has most influence over the learners?

When considering learner motivation and user engagement, this study looked at those considered by the learners to be most influential in their decision to take e-learning. Figure 3.4 looks at the learners' response to the question, whose opinion is most likely to encourage me to take an e-learning programme? Only 13% of the 2,000+ learners felt that training professionals (9% training department and 4% learning centre co-ordinators) would have the most influence. This again is counter intuitive to popular practice as most marketing communications come from the training function.



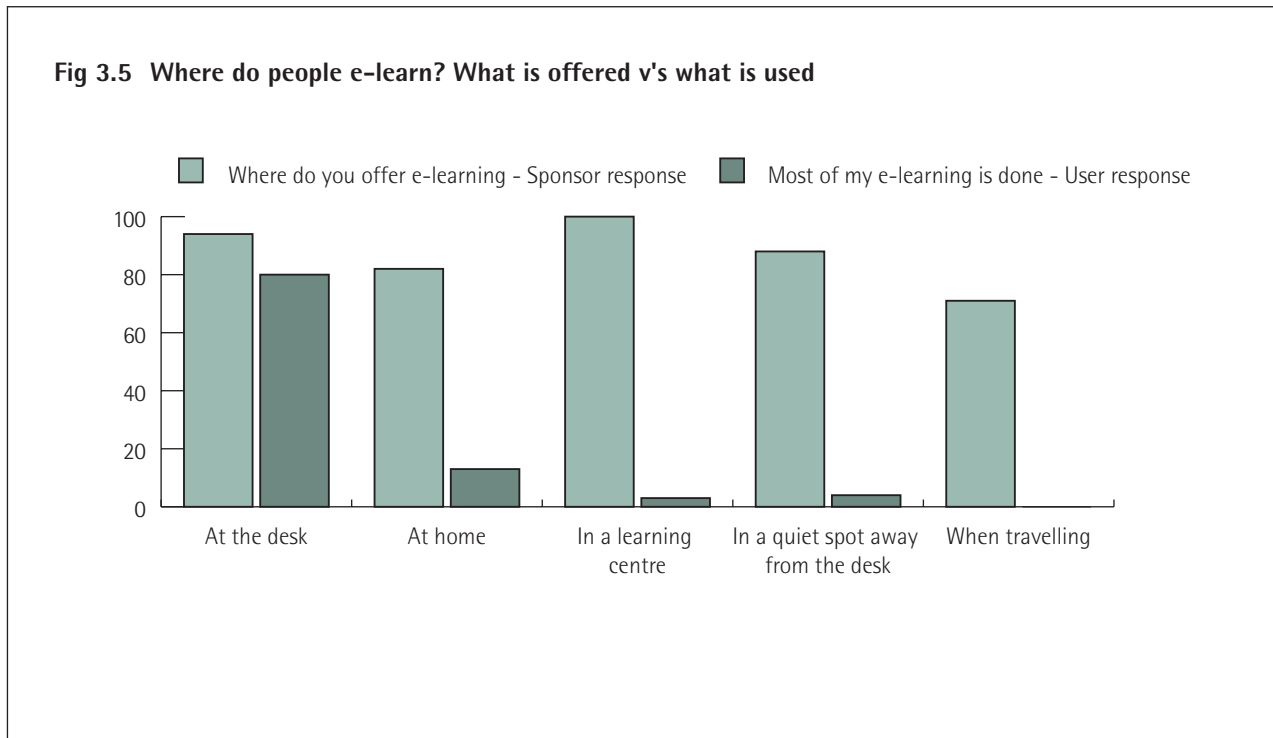
55% of the learners feel that their managers are the most influential in their decisions and 23% (perhaps the more cynical) are most likely to be influenced by their peers. This finding is significant for training professionals continuously looking for routes to motivate and encourage learners. It indicates that focus on enabling managers to support e-learning and encouraging user recommendations may have a have an increased impact on learner engagement.

### How important is choice for learners?

One of the most commonly stated benefits of e-learning has always been the choice it offers of where, when, what and how to learn. This flexibility has always been stated as an important advantage for organisations. But how important is that choice for the individuals?

### Choice of location

The study compares the location choices offered by the participating organisations with the location that is used the most by the learners. 100% of sponsors stated that it is important to offer learners a choice of location for learning and this is reflected in their offerings of location – 100% have invested in learning centres, 94% offer learning at the desk and the majority also offer learning at home (82%), at a quiet PC away from the desk (88%) and whilst travelling (71%) – see figure 3.5 for details.



This choice may also reflect the historical development of e-learning and improvements in infrastructure. Learning centres are a traditional starting point for technology based learning. However the improvements in the internet, notably broadband, now ensure that the learning experience is equally strong away from dedicated learning environments.

80% of users are learning at the desktop, with 13% learning at home. Only 3% are studying in learning centres and 4% are using quiet PCs. These findings highlight actual behaviours rather than stated preferences but given that the learners have been given a choice, the high percentage of those learning at the desk indicates that, despite distractions, this is a training location that works for them.

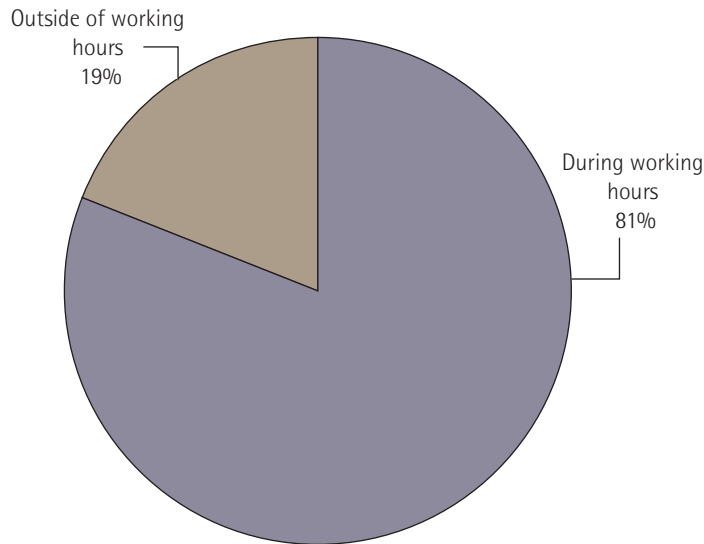
Organisations often make substantial investments in learning centre facilities and these will remain critical in certain circumstances, particularly when learners are not IT literate and are looking for support, or for organisations where desktop or remote learning is not feasible.

However the findings indicate that within organisations with an established e-learning presence, the desktop is the primary choice of learning location. It should be noted that the role of choice may still remain significant and a backlash may occur if all other choices are removed. But it may be worth re-evaluating the resources and costs of providing the other choices in the light of these findings.

### Choice of learning time

81% of learners learn during working hours with 19% outside of working hours. This would be expected if learning is still considered to be formally linked to work. Despite its flexibility, e-learning is still not considered by the majority of learners as an opportunity to for self development on their own time. Again this preference should be taken into consideration when planning e-learning events.

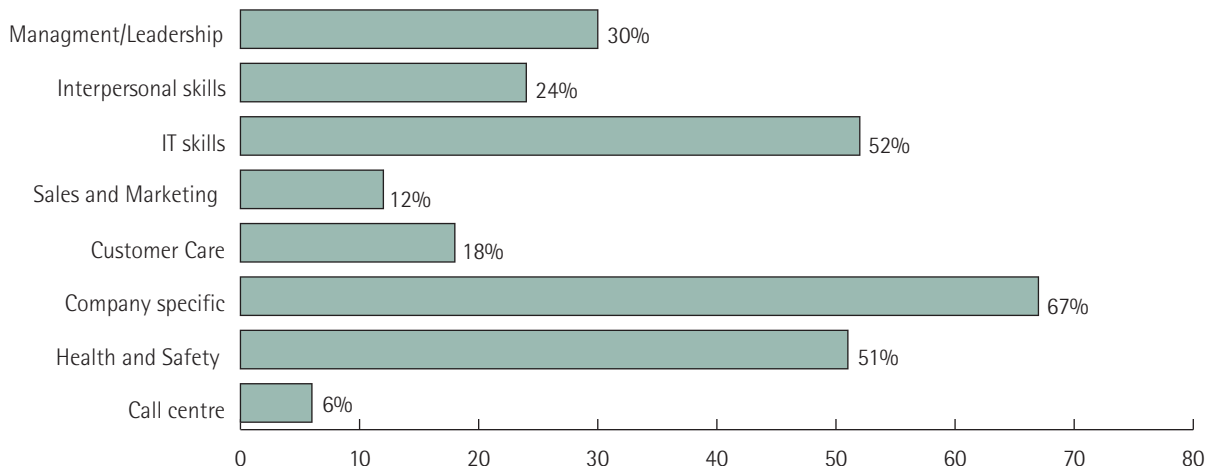
**Fig 3.6 When do people e-learn?**



**Choice of courses**

Figure 3.7 looks at what subjects are actually being used by the learners. As expected, there is diversity but the results show that learners are using e-learning for multiple subjects rather than just one. Company specific learning is the most popular – this includes compliance training, induction etc) but IT and Health and Safety are also used by over 50%. Subjects where e-learning has traditionally not been considered as appropriate are also well represented and used (interpersonal skills, management training, and customer care).

**Fig 3.7 What do people e-learn?**



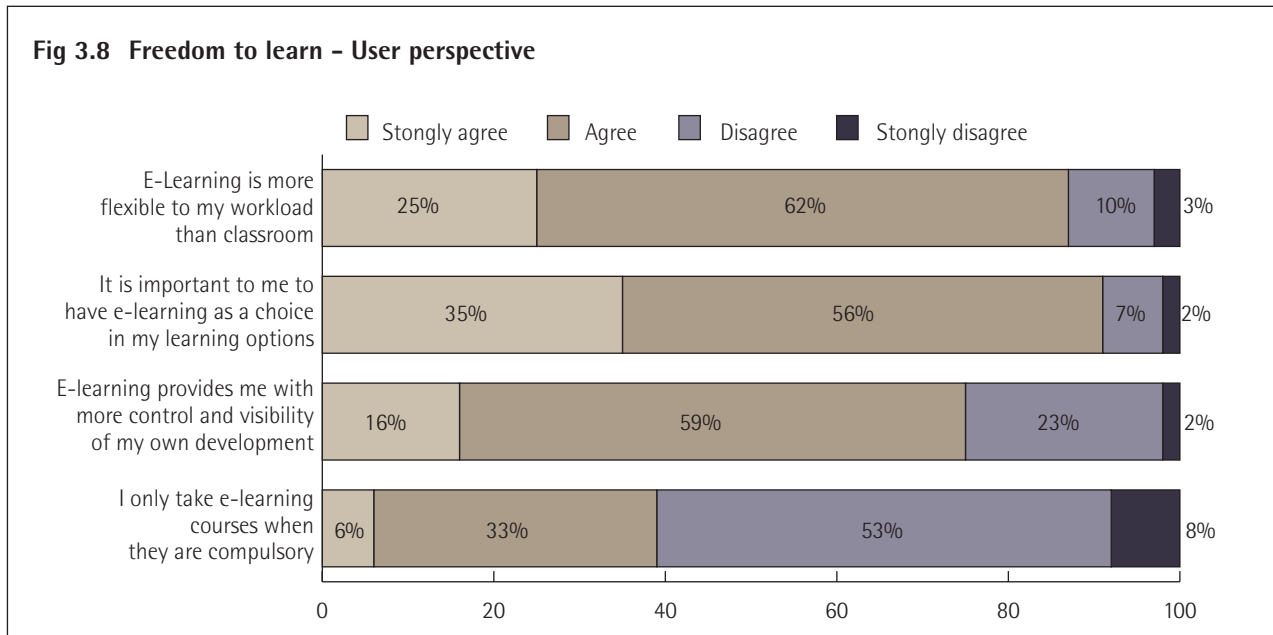
**A comment on e-learning options**

99% of sponsors believe that it is important to provide learners with a choice of learning options within e-learning offering subjects in different media. However the sponsors agree that it is not feasible to offer everything in all formats.

In addition, accessibility is now an increasingly important consideration in content design – a recent example of compliance content within BT used phone lines, text versions and versions for impaired visibility to ensure maximum inclusion.

### Choosing to e-learn

Are learners being pushed down the e-learning route without choice within these organisations? Figure 3.8 shows opinions that would indicate that e-learning is now becoming an active choice for these learners.



In certain circumstances organisations need to make e-learning compulsory. Primarily it will be mandated in areas such as health and safety or compliance training but the findings indicate that the majority of learners would choose to take e-learning, with only 39% agreeing that they take e-learning courses only when they are compulsory.

87% of the users find that e-learning is more flexible to their workload than classroom and 75% believed that e-learning provided more control and visibility over their own development. 91% indicated that it was important to have e-learning as a choice within their options.

In the established e-learning organisations, the learners understand the personal benefits for e-learning, see it as a valid option for learning and are actively choosing it as an option that suits them.

### Summary of key findings

- The majority of learners in these organisations find value in e-learning and would recommend e-learning to a colleague.
- Learners require a relevant context for e-learning, often provided by the content itself in tailored programmes. But generic e-learning requires external context such as the presentation within a competency mapping to appear relevant.
- Generally the study did not find that there were particular audiences that are more receptive to e-learning than others. The strength of the learning need will influence audience receptiveness.
- The training department has little influence in encouraging learners to e-learn, managers and peers hold far greater sway.
- The users' need for recognition and a framework or structure within e-learning is perhaps stronger than current e-learning practice would accommodate.
- Having e-learning as a choice is important for learners as it is perceived to provide increased control and flexibility.

- The majority of e-learning is done at the desk in working hours. When learners have the option of learning at the desk, the use of learning centres is limited.

### e-learning in action – Reward and recognition at Manchester NHS Agency

The Education, Training and Development Department supporting the Manchester area has 18,500 potential learners and needed to improve IT skills in line with the modernisation agenda set by the government. Its aim is to improve confidence in the use of technology in order to further improve efficiencies and service across the health community.

Manchester NHS was amongst the first in NHS to use the ECDL qualification to provide consistent learning and basic IT skills. These skills are seen as a forerunner to other new initiatives such as integrated care and patient records.

In order to implement the programme, Lavinia Wilkinson and her team had a number of obstacles that they had to overcome. The learner community was vast – consultants, nurses, porters, management, financial, health care providers in the community – they all had diverse backgrounds and locations. Using technology to teach basic technology skills meant that the team would immediately need to overcome fear of technology and cultural barriers.

The team, starting with no e-learning experience, worked at creating an approach to draw the users in:

#### Create pull from the learners

The team realised that success would only come if they could help to create pull by the learners. This was done in a number of ways. Firstly they requested participants for a small pilot of 50 – over 500 applied, immediately generating interest. The offer of a qualification also generated interest, and pull is currently maintained by the waiting lists for course attendance.

#### Create structure

All intakes are scheduled on a 10 – 30 week programme with an offer of a qualification. Programme starts with a 2 hour induction in the centre so that individuals become familiar with the learning process, the e-learning tools and understand clearly what will happen in the first week. The learners then attend a series of workshops, facilitated by a tutor, where the skills are primarily provided by online content so that everyone works at their own pace and interest.

#### Create confidence

They ensured that the technology used was user friendly, fun and interactive, the hands on induction process removed fear of process and technology.

#### Create support

The tutor in the workshop is there to answer any questions on the spot and help individuals over difficulties. They look for issues and provide informal demonstrations on a case by case basis. Learners are also offered telephone support from 8am– 6pm each day and paper based materials such as manuals, exercises, alternatives, resource sheets for different applications etc.

#### Create consequences and rewards

Learners perceived the qualification as an important benefit of the learning. In addition Continuing Professional Development (CPD) credits are also offered to doctors by the Royal College of Physicians which acts as an added motivation for this busy segment of the audience. It also introduced consequences for non attendance to dissuade learners from dropping out.

continued on page 40 ▶▶

## e-learning in action – Reward and recognition at Manchester NHS Agency continued

### Create visibility of success

Internally – Award ceremonies allow staff recognition, awards held bi-annually to share good news and acknowledge and recognise achievements with peers and senior staff on a local and national level. Awards are provided in the following categories:

- First individual from each study centre to complete.
- Difficult circumstances
- Quickest person to complete on this round of training.
- Excellent results.
- Despite finding the course difficult, remained positive and now hold ECDL
- A one-off award was also provided for the first member of staff from Social Services to complete.

Externally – A survey, conducted by Happy Computers (vendor partner), based on a sample from the pilot of 160 learners in Manchester NHS found that achieving ECDL using LearnECDL materials and an intensive blended approach, with training support, resulted in increased confidence and an average saving of 38 minutes a day. This statistic has been widely quoted both within the NHS and beyond creating visibility and support for these methods.

### Results

The results of this implementation have been recognised and acknowledged both internally within the NHS (the programme now has extensive waiting lists) and externally (the training team have won awards from the Institute of IT Training). The drop out rate is less than 5% with those unable to finish the course often rejoining later when circumstances permit. In addition the investment has increased in training services and personnel due to demand.

# CHAPTER 4

## Findings and Analysis 4 - Manager Influence and engagement

This chapter looks at the role and influence of management in the effective implementation of e-learning and examines ways that the participating organisations have found effective in engaging managers.

### Role and perception of management in e-learning

#### Senior management

As previously discussed, the sponsors believe that board level management rank along side learners as being the most significant stakeholders to influence success (see figure 2.3). As such the organisations identified multiple ways to involve senior management in both ownership and implementation of the programmes:

- Board level ownership is most to be likely sought and obtained for company specific e-learning projects such as the rollout of a new system or to increase awareness of company strategy. Often such e-learning programmes will also include a cameo video of the executive within the programme itself.
- Unisys University involves senior executives as Deans of the Schools within the university, setting and reviewing the direction of the university.
- Unipart encourages all board members to complete the internally developed courses in pairs and to share their views with each other. All subsequent endorsements were then out of experience and were respected.
- Internal studies at PwC showed that when a partner or senior manager hosts a discussion or introduction session to reinforce commitment it has a significant impact on usage.

Figure 4.1 outlines the sponsors and users perceptions of senior management involvement.

75% of the sponsors believed that senior management regularly showed commitment to e-learning. By comparison 64% of the users felt that senior management were visibly supportive which although it is lower than the sponsors' perception is still high given that the users are often removed from senior management.

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Linking Learning to Business Research report 2004  
 Findings and analysis 4 – Manager Influence and engagement

**Fig 4.1 Perceptions of senior management involvement**

Legend: Stongly agree (lightest tan), Agree (medium tan), Disagree (grey), Stongly disagree (darkest grey).

Perspective	Stongly agree	Agree	Disagree	Stongly disagree
Senior Management regularly demonstrate commitment to e-learning - sponsor perspective	12%	65%	18%	6%
Senior Management are visibly supportive of e-learning - user perspective	7%	56%	32%	4%

In addition 94% of the sponsors felt that the success of e-learning initiatives was recognised at senior management levels.

**General management**

We have already discussed the considerable influence of line managers on the opinions of the learners (see fig 3.4) and that they are key stakeholders in continued e-learning success (see fig 2.3). Yet this level of management is often the hardest to bring on board.

Many of the participating organisations (for example, Unisys, BA and Marsh) are looking to encourage a self-development philosophy. They do not insist on manager approval for learning. This cuts out a potential stumbling block in the process. This study still shows that 74% of the learners believe that their manager supports and encourages their use of e-learning. However only 43% believe that they are provided with enough time to learn at work. (see fig 4.2), indicating that the manager's support extends beyond course approval.

**Fig 4.2 Influence of Managers a User Perspective**

Legend: Stongly agree (lightest tan), Agree (medium tan), Disagree (grey), Stongly disagree (darkest grey).

User Perspective	Stongly agree	Agree	Disagree	Stongly disagree
My Manager supports and encourages my use of e-learning	13%	63%	23%	2%
I am provided with enough time to learn at work	4%	39%	43%	13%

**Involving management**

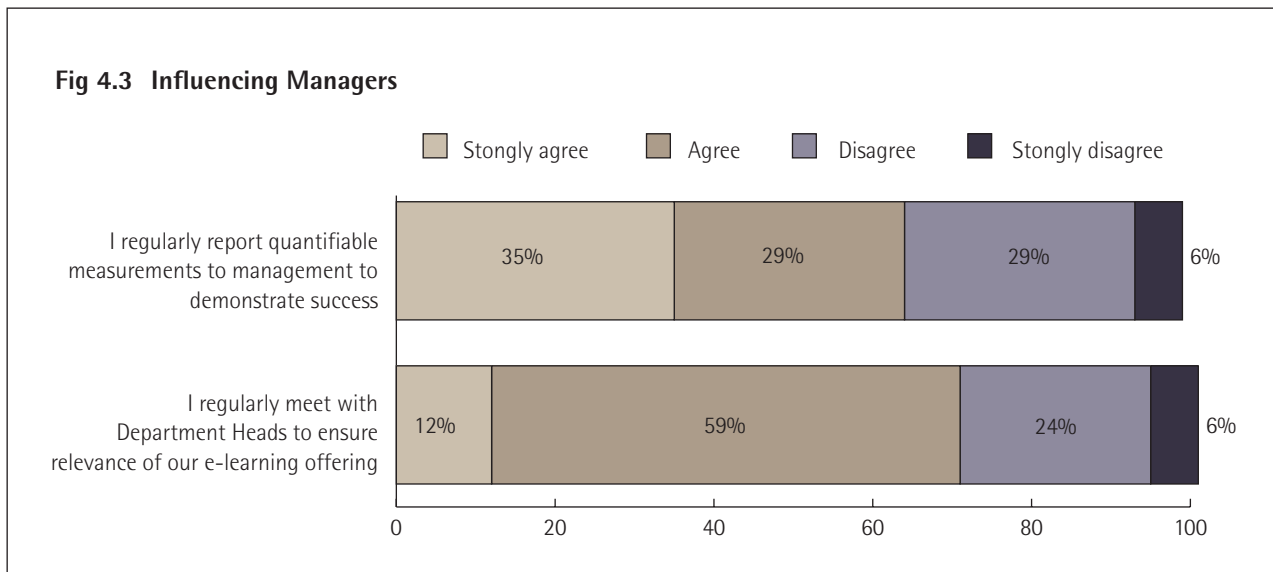
Line management's focus on process and delivery of day to day results means that learning and e-learning are low on the agenda until a crisis occurs.

Figure 4.3 shows that 71% of the sponsors regularly meet with department heads to ensure the ongoing relevance of

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the offering and 65% regularly report back quantifiable measurements that demonstrate success, a percentage that is perhaps lower than expected given their significance in influencing success.



The Distilled Wisdom 2 table below outlines a number of activities that the participating organisations have used to successfully engage busy line managers with e-learning both as learners and as supporters of e-learning.

### Summary of key findings

- e-learning has successfully caught the attention of senior management in the majority of these organisations who are visible in raising the profile of e-learning initiatives.
- e-learning sponsors continually look for new ways of engaging managers with e-learning – 3 strategies are having impact.
  - Providing specific job relevance is critical
  - Clear demonstration of personal or team time savings
  - Negative consequences (such as naming and shaming, league tables) have more impact than positive rewards.
- The majority of users believe that their managers support and encourage e-learning but need more pragmatic demonstration of that support through the allocation of time.

### DISTILLED WISDOM 2 – Tips for engaging line management with e-learning

#### Use e-learning to save managers' time

- Virtual classrooms reduce travel time and is seen as useful for meetings
- The Harvard resources used by Credit Suisse First Boston (CSFB) offers managers just in time support – their usage regularly increases during the month before the performance review process.

#### Keep it visible

- Attend management meetings

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## DISTILLED WISDOM 2 – Tips for engaging line management with e-learning continued from pg 43

- Marsh uses hard facts and numbers linked to business related information.
- Unisys and others deliver regular communications including roadshows and one to one meetings.

### Use management in early adopter programmes

- Early adopter success stories that create role models for management
- BOC brought the South Africa head of sales on board first in a new programme. As a result all managers were then trained first in the new systems before rolling out to the rest of the staff

### Keep it personal

- Link e-learning to management objectives and personal development plans

### Keep it relevant

- Ashridge Virtual Learning Resource Centre offered by BUPA is specific and relevant to management, BUPA is constantly in the top five users. The site is used to support a number of programmes in a blended learning approach.
- B&Q offers information packs to store managers indicating specific benefits for managers.

### Keep it competitive

- League tables are regularly used in the participating organisations with managers' names highlighted against their department's e-learning performance amongst peers and higher.

### Make it easy

- BT has now implemented a management tool box for certain compliance programmes which helps managers get relevant content to audiences faster.
- RBS encourages first line support for managers as mentors so it needed to empower its managers to act by providing key sign off points and relevant resources. It created a binder containing guides linked to role matrix, how to link to personal development plans and information from senior project sponsor, it also uses virtual classroom to bring managers together.

### Demonstrate industry innovation

- Marsh – General Insurance Standards Council (GISC) programme – not available to buy off the shelf, initiated a consortium with other firms to create an award winning product that is now available via the Chartered Insurance Institute. This increased business credibility internally and caught management attention for e-learning leadership.
- Organisations such as Manchester NHS Agency and Unisys won industry awards. External recognition of their initiatives further encouraged internal support

### Actively include e-learning within management training programmes

- See e-learning in action case study with BT below

## E-learning in action at BT – engaging managers with compliance e-learning

As the largest player in the telecommunications market, BT is under constant regulation by Ofcom (previously Oftel). It is the highest priority for BT to ensure that it acts in compliance with the regulations set out. In 2003, the organisation was asked by Oftel to demonstrate that it was not information gained in one area of its business to gain unfair competitive advantage in another. Sharing valuable information across businesses would severely restrict its competitors and result in heavy penalties. BT was keen to demonstrate that it was acting in compliance with the demands of Oftel in this matter. The compliance training and communications team were asked to develop and implement an e-learning project that would raise the awareness of managers as to their responsibility for sharing information within the organisation.

The project had a number of key challenges:

1. The compliance issues could not be implemented by physical system constraints alone, it was dependent on awareness and behaviour change at an individual level.
2. Demonstrating external commitment to compliance was so important internally that a directive was given that the organisation had to achieve close to 100% training completion (allowing for all managers on maternity leave etc). This meant that 27,000 managers had to complete the programme in a three month window from July to September. Experience from previous projects indicated that this scale of engagement would normally take up to five years and then only achieve 90% compliance. Even though the three month window was over the holiday period it was imperative that the targets were achieved, as it would set an external benchmark for BT's ability to meet its compliance obligations.

In order to achieve this objective, Laura Huggins, Head of Regulatory Compliance Training and Communications, turned to e-learning to address the volumes and speed of delivery and worked with Saffron Interactive to develop a programme that would engage the managers and influence their behaviours. The package was developed in 2002 and launched as 'recommended' for senior managers. 600 completed the course prior to the roll out period.

The following steps all played a critical role in achieving the objectives for the programme:

### Course design

The 'Sharing information course' included a number of elements designed to specifically address the needs of and influence the behaviour of the managers. The course set the context at the beginning by addressing the question 'Why?' It then went on to look at the question 'How will this affect me?' and this included 20 different options and examples that could be tailored to the experiences of the managers across the organisation and included a section that provided additional guidance for managers in particularly high risk areas. Also included were seven different business scenarios to help apply the learning to the experiences of the managers across the organisations.

A decision tree was developed and presented within the course to help managers make correct decisions back in the workplace and this could be accessed both online via the course itself, as well as being available in word format and as a desktop application.

The proof of learning quiz questions were designed to be particularly challenging, using a range of adaptive questioning techniques and click all that apply questions. The difficulty caught managers off guard and, because the tests provided direct access to the content itself, they encouraged course usage.

The course was created in a text only version to ensure accessibility for all staff.

### User testing

A range of managers had the opportunity to comment on the programme before the rollout and provided feedback to ensure that the navigation was intuitive, the content was accurate and flowed correctly. As a [continued on page 46 ▶▶](#)

## E-learning in action at BT – engaging managers with compliance e-learning continued

result, any ambiguities were corrected, some of the language was simplified and some technical fine-tuning took place to improve download speed times. The accessible versions were also tested at this stage to ensure efficient access via the text readers.

### Identifying risks and mitigating strategy

Given the short time frames and high internal and external expectation for the programme, a number of risks were identified up front and mitigating strategies were adopted. For example, the competitions and positive reinforcements were identified to address the potential summer lull that could occur over the holiday period. Active engagement of the CEO, senior management and the compliance community together with targeted programmes for major buildings were all put in place to drive engagement over the holiday period.

With the volume of staff accessing the material, the stability of the e-learning programme was essential and special arrangements were put in place to ensure around the clock back up.

### Communication

Whilst the course was mandatory, the time frames, audience size and audience make up, meant that making the programme compulsory would not guarantee take up. A continual communications strategy was introduced across the three month period which included both positive and negative (name and shame) reinforcement to ensure that the learning was taken.

A detailed project plan was developed outlining communication activities for all key stakeholder groups which also included specialised bodies such as the training and communications forum, web masters for group compliance web site, HR and 130 members of the compliance community. Each communication addressed the issues of why this was important to the company and to the individual.

Communication strategies included:

- CEO emails and endorsements at the start and one month prior to the end
- Linking of relevant web sites across BT (e.g. compliance, HR, ) to provide consistency of messaging
- Advertising and re-advertising using pop up buttons on BT Intranet each month
- A Competition – advertised throughout three months with specific final push campaign in last week (it also advertised the winners)
- Articles in BT Today, people news and any relevant internal publications
- Regular feedback to the lines of business on completion rates
- Adding reminders on email signatories
- Badges, posters, business cards for all of the compliance community to raise awareness
- Open day promotion
- Towards the end, two members of staff personally called managers to drive up completion rates

continued on page 47 ▶▶

## E-learning in action at BT – engaging managers with compliance e-learning continued

- Regular follow to CEO and general managers using emails outlining completion rates ensured constant engagement
- SMS messaging
- Recognition of key players

### Results and lessons learned

The team achieved all of their targets by the 30th September 2003 deadline. A number of lessons were learned along the way:

- The challenging tests attracted management – they couldn't pass first time so realised they needed to take programme
- The inclusion of relevant business applications was essential to bring the compliance content alive
- The competition did not drive management usage or motivate managers (but it did work for team members as 10,000 team members went through the programme as a result of the competition)
- The reporting mechanism was critical as the run time statistics, departmental league tables and the threat of personal naming and shaming had a dramatic impact on management take up. As important was the ability to identify and exclude people who were unavailable for training e.g. those on long-term sick or maternity leave
- In hindsight the team would set an early common understanding of the target dates – setting the date at least two weeks prior to the actual date to spread the last minute rush
- The programme raised awareness of general compliance issues and had a knock on effect of driving usage of other compliance training
- The programme reinforced the importance to the business of working with other HR and security processes – the tighter reporting for the management audience tied into other systems that monitored maternity, full time employment and highlighted areas where they were not being implemented
- Senior management commitment was essential in ensuring that every one was able to undertake the training

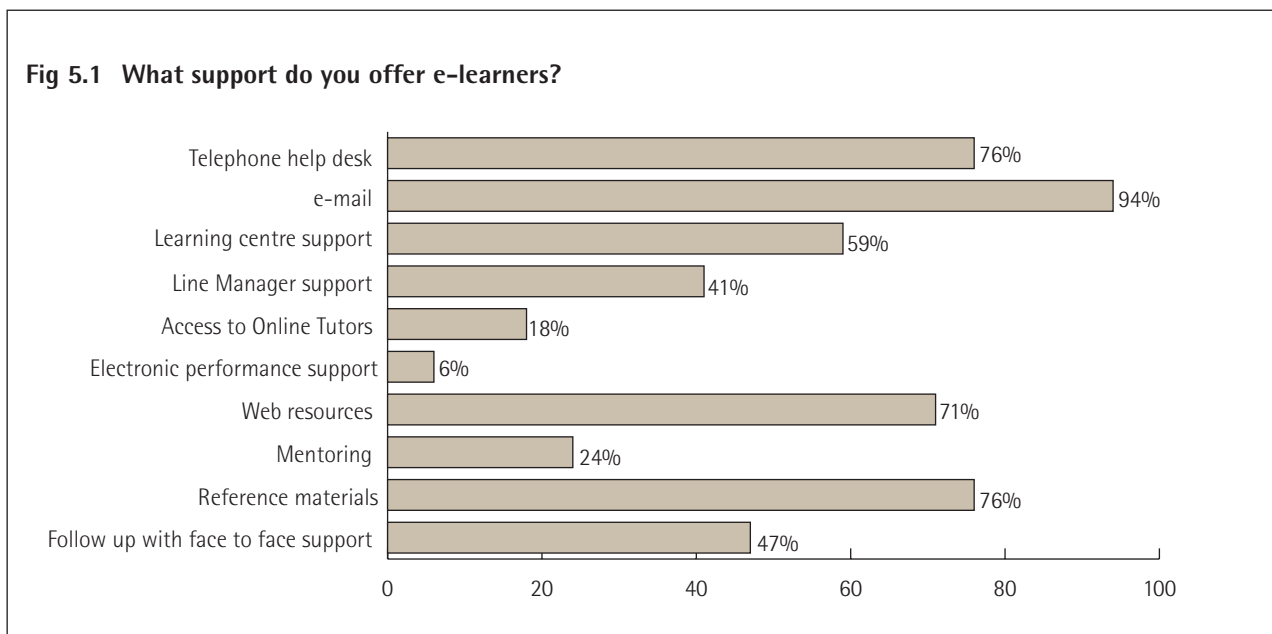
# CHAPTER 5

## Findings and Analysis 5 – holistic learning

This chapter investigates the role of e-learning within the context of the total learning and business environment. How are learners being supported as they e-learn, how are they being helped to apply the learning and how can e-learning be successfully integrated into ongoing learning and development programmes?

### Investment in and choice of learner support

The study showed that supporting the e-learner was not an optional extra for the participating organisations. Content was rarely delivered in isolation. Figure 5.1 shows both the range and options of learner support that the participating organisations are offering to learners. Investment in learner support is extensive and covers both technical support and business support to facilitate the ongoing application of new skills into the work environment.



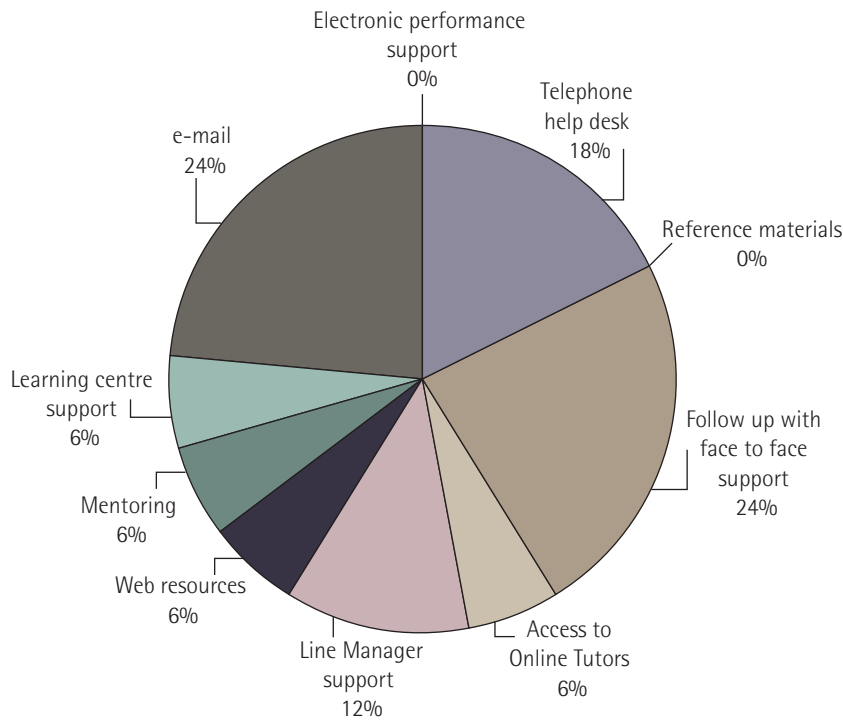
76% provide a telephone help desk either internally or via an outsourcing partner, 94% offer an email support system for technical support and over 70% offer additional web resources and reference materials to support online courses. 59% offer learning centre support for both technical issues and training advice.

Face to face support is also encouraged with 41% engaging line managers to mentor and coach learners back in the work environment, helping to increase the integration of learning into the workplace. 47% offered follow up with face

to face support either in classrooms, workshops or one on one.

With a range of support options on offer, the sponsors were asked what support they believed was most popular with the learners – figure 5.2 outlines their responses. Face to face and email support were highlighted as the most popular and most used support mechanisms. E-mail although ubiquitous and in danger of over use is a medium that is familiar to learners. The high popularity could reflect the fact that it is easy to use for both trainers and learners. It is cost effective to implement and can provide immediate and specific help.

**Fig 5.2 The most popular support system – a sponsor perspective**



Interestingly, whilst 76% provided reference materials for the learners, no-one highlighted that this was the most popular. Equally Electronic Performance Support System (EPSS) systems did not score in popularity. This may indicate that that these materials are not useful but it is more likely to indicate that whilst learners may use these systems, they are not recognising this informal learning as part of the package.

Anecdotal evidence also provided additional insights into support effectiveness. Unisys has introduced pro-active online mentoring support. Learners are regularly contacted by mentors who are pro-active in driving the users through the material with the objective of passing the certification exam. Student feedback is either black or white – they either love the contact and the discipline that it imposes or hate the daily prompts and helps, although the mentor system can be switched off or slowed.

Organisations have also provided positive feedback on online books and resources, a relative newcomer in the e-learning mix. All organisations who have implemented it (approx 40%) have found the resource immediately popular with learners (based on usage) due to its flexible nature and speedy search access.

Impact of web-based learner support depends on the familiarity of learners with both the web and an online self service environment. BA trialled a 'doctor on line' approach where staff were able to ask questions linked to particular IT issues and receive answers within 24 hours. Usage was low and it was difficult to staff so the project was shelved. This may be reviewed in the future in the light of continually changing attitudes to learning and approaches to internet use in general.

PwC, like many others interviewed, offers an integrated view of learner support and considers what is needed by the learner before during and after an e-learning intervention:

### **Before e-learning**

The support answers questions that the learner needs to know: what is this? what is in it for me? who is recommending it? what is the context/business need? do I have technical access? These support needs are met through communications programmes and are driven with the main project champion. They may also use classroom interventions to address these issues, for example in the induction programme, new starts will meet face to face prior to moving on to the e-learning itself

### **During e-learning**

Support may be offered in a variety of ways such as help desk for technical access, local learning contacts and champions, learning support e.g. offering access to tutors or subject matter experts using virtual classroom technology, booklets/ frame work summaries and peer group work within the classroom

### **After e-learning**

Tracking systems allow learner progress to be monitored and evaluations highlight areas of potential exposure that can be followed up. Classroom interventions where appropriate allow learners to confirm knowledge or comment on the subjects.

Technical support will also be offered at different levels throughout the programme – Level 1 support through local IT divisions who are provided with a script to address basic questions, Level 2 support is offered by the Learning Technologies group itself.

At Cisco, following a knowledge transfer event, staff are directed to an integrated range of supporting materials which include:

- Frequently asked Questions ( they aim to address 90% of queries in this section and will adapt the question and answers to meet changing needs)
- Discussion boards where ideas are shared (particularly used to bring staff together for ongoing improvements to processes within the organisation)
- Contact names for technical and subject matter support

Every effort is made to ensure that all resources are visible to all staff.

Performance support tools are used at Cisco to support and introduce mission critical events (e.g. the move to a new platform) or an initiative where the risk or impact of error is high. However the implementation of these critical processes will involve more checks and balances throughout the business. Management will be encouraged to become more involved and will be responsible for auditing the e-learning that takes place. Online assessments will be monitored more closely. Tutor support and classroom learning are likely to increase in these examples and there will often be a network of super users involved to ensure the smooth rollout. Cisco believes that there is no substitute for management focus in the implementation of learning around such events

With these varied support mechanisms in place, do the learners feel supported or isolated? 75% of the learners feel that their training department supports them as a learner and 66% believe that the support provided meets their needs. (see figure 5.3). Whilst these numbers are high, they are not as high as could be expected given the support options open to them and this may be because:

- They are not aware of the support open to them
- They have unrealistic expectations of the e-learning content



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The support options are not appropriate for the individual.

46% of learners believe that they were trained effectively on how to use e-learning and this could reflect the mixed responses of the sponsors to providing training on how to e-learn. Only 59% of the sponsors felt that it was critical to provide effective training on e-learning which was either done face to face or via specially commissioned online learning programmes. The others feel that it is important that e-learning is intuitive and that it should not need additional training.

**Fig 5.3 Learner support – a user perspective**

Statement	Strongly agree	Agree	Disagree	Strongly disagree
My Training Department supports me as an e-learner	12%	62%	23%	3%
During an e-learning programme, it is not easy to find support when I need it	5%	39%	54%	2%
The e-learning support provided meets my needs	3%	62%	32%	2%
I was trained effectively on how to use e-learning	4%	42%	47%	7%

As the e-learning options become more varied (incorporating content and support, formal and informal learning) – it may be appropriate to reconsider how the learners are trained to make the most of the facilities available.

### e-learning in action at the NHS Information Authority –the impact of learner support

The NHS Information Authority is managing the service to provide all NHS staff with basic IT skills. The ECDI became the reference standard in November 2001 and the NHS Information Authority provides centralised resources to support local implementation. It works with Spring IT (which leads a consortia which includes Course-Source Ltd, Happy Computers and NCC Education) which run an ECDL portal supporting learners within the NHS in a number of different ways, allowing centres and individuals the flexibility to gain the qualification in a way that suits. The portal offers:

- Online training courses (with pre assessment and quizzes)
- Online assessment tests for accreditation (both the courses and assessments use the actual applications)
- Practice tests to check competency and build confidence
- Flexibility to use classroom
- Monitoring and tracking of staff UK wide

Learners are also offered resources such as online manuals and a help desk. The centres themselves will use these support materials and implement them in conjunction with their own training resources and strategies (see case study on Manchester NHS Agency).

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## e-learning in action at the NHS Information Authority –the impact of learner support cont

Extensive communications campaigns surround the rollout of the programmes with appropriate messages tailored to the target audiences. The impact of an ECDL qualification will differ for support staff, nurses, doctors etc.

However with over 450,000 people to reach over the next five years, the NHS Information Authority also offers another form of support to the centres – information and training for the local trainers who will be involved in the delivery of ECDL and need to change their method of delivery to include e-learning and e-tutoring skills.

The project team at the NHS Information Authority created a programme to facilitate capabilities in the use of new technology and skills to provide the trainers with their own learning that modelled a supported e-learning experience.

To motivate trainers to join the programme, the NHS Information Authority worked with the Institute of IT Training to offer a specially written e-tutoring qualification which addressed the ways that technology can be used to communicate and the skills and methods that are needed to effectively implement and blend the e-learning resources available to the NHS. The course is a blended learning approach that starts with one day in the classroom followed by learning experiences that takes place on-line with a high level of remote Tutor support and peer-to-peer interaction. The learning experiences will include:

- A one day face to face event at the start which brings learners together and builds common understanding of the programme and basic training standards, sets targets and, perhaps most importantly, builds commitment between learners.
- Virtual classroom sessions and self paced study.
- Preparation of assignments and submission of support e-mails and chat transcripts for online feedback from e-tutors and course peers.

### Results

In the industry, this programme is widely considered to be a success – completion rates are 93.8% and average learner satisfaction ratings of 5.95 out of a maximum score of 6.

In addition, over 50% of the delegates on the NHS INFORMATION AUTHORITY programme took part in the online survey as part of this study. Here are the specific results for this group of users compared to the benchmark results of the complete group.

94 % agreed that it was important to have e-learning in their options (group average 91%)

97% agreed that introduction of e-learning is a valuable addition to their learning options (average 90%)

91% agreed that e-learning had increased their opportunity to build new skills (group average 77%)

98% would recommend e-learning to a co-worker (89%, the group average)

84% e-learning support meets my needs (65% was the group average)

The high scores (from training professionals, who typically can be reluctant to embrace e-learning) are a testimony to the success of this approach.

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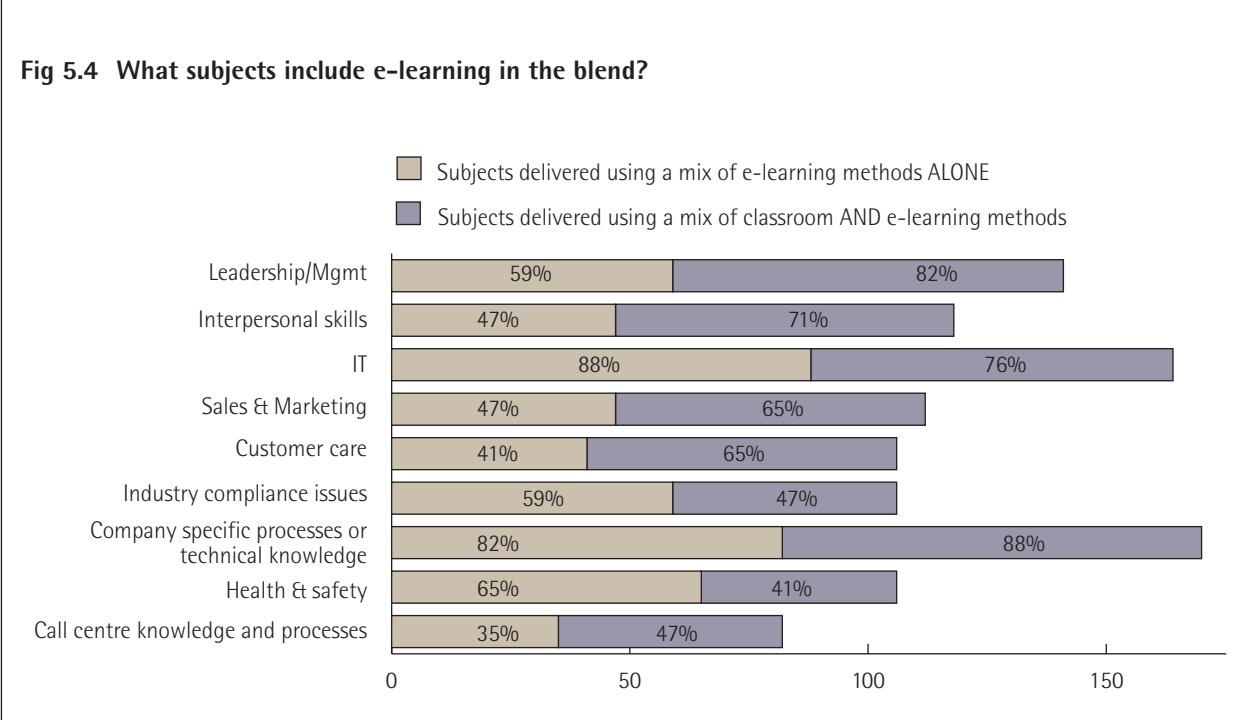
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## Making the most of blended learning

Blended learning is the latest buzzword but all of the participating organisations have been embedding e-learning as an integral part of their overall learning mix before the term was coined. The embedding has contributed to their sustained success. The findings discussed in this study so far show that the participating organisations spend time and effort integrating e-learning into day to day business practices. This section outlines how that integration is extended into developing blended learning approaches for formalised training programmes within the organisations.

In the light of the current focus on the use of e-learning within an overall learning solution, the sponsors were asked; what subjects they taught using a blend of both e-learning and classroom and; what subjects were taught using a blend of e-learning methods alone. Their responses are summarised in figure 5.4 below.

**Fig 5.4 What subjects include e-learning in the blend?**



Subject Area	Subjects delivered using a mix of e-learning methods ALONE (%)	Subjects delivered using a mix of classroom AND e-learning methods (%)
Leadership/Mgmt	59%	82%
Interpersonal skills	47%	71%
IT	88%	76%
Sales & Marketing	47%	65%
Customer care	41%	65%
Industry compliance issues	59%	47%
Company specific processes or technical knowledge	82%	88%
Health & safety	65%	41%
Call centre knowledge and processes	35%	47%

It is clear from these findings that the participants are applying e-learning methodologies across multiple skills areas and are not restricted to one area – on average each participant used e-learning in five or more subject areas indicating the established role of e-learning outside of the traditional IT domain. Figure 5.4 shows that aspects of all subjects have some e- incorporated into the blends. IT, company specific information and management and leadership are areas where e-learning is most commonly applied.

More significantly, not only is an e component being blended with classroom but also these organisations are not afraid to blend the e-components without the use of classroom for certain areas across the full range of subjects offered. In fact with these established e-learning users organisations are more likely to offer health & safety and IT through blends of e-learning alone rather than in a mix with traditional classroom.

Blended learning traditionally has meant tagging e-learning content onto classroom courses either as a requisite or as a refresher with little cross reference to either media. The study found that many of the participating organisations have applied a more sophisticated approach to blended learning by considering the full project on a component by component basis. Table 5.1 outlines some of the components used by these organisations within their approach to blended learning.

Given its current profile, much has recently been written about blended learning so this study will summarise the

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Table 5.1

TECHNOLOGY COMPONENTS	FACE TO FACE COMPONENTS
Online testing (Pre and post assessment)	Tailored classroom courses
Online surveys and evaluations	Generic classroom courses
360 degree assessment	Workshops
Virtual classroom	Facilitated e-learning sessions
Online mentoring	Role Play
E-tutoring	Presentations
Chat rooms	Discovery groups
Facilitated discussion rooms	Line Manager mentoring and coaching
Generic content	Subject matter expert access
Tailored content	One on One trainer sessions
Online simulations, case studies and games	Conferences (internal and external)
Online books	Invigilated testing
Online resources (templates, FAQs)	
Toolkits	

anecdotal evidence of the participating organisations to highlight the main lessons that they have learned in implementing successful blended learning.

### DISTILLED WISDOM 3 – Contributing factors to successful blended learning

#### Starting points

- Evaluate and define learning needs up front
- Define learning outcomes before designing blended learning solutions
- Match appropriate media and resources to learning outcomes
- Find or create best products to meet needs
- Cut your coat according to your cloth – review subject matter expert availability, look at demographics and budget for each project
- Link learning to competencies where possible

#### Successful uses of technology

- Use e-learning for conceptual ideas
- Think through e-learning content design, involving users where possible, as good design may eliminate the need for coaching
- Use e-learning for technical information e.g. methodologies, audit, processes or IT
- Soft skills can be modelled on the computer for sensitive topics – using e-learning for

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### DISTILLED WISDOM 3 – Contributing factors to successful blended learning continued

areas such as ethical issues or privacy can build knowledge but all reduce exposure in the learner which increases openness to change.

- It is critical that the links between e-learning and work are clear (back to context again)
- Use e-learning for high volume/short time frame initiatives
- Provide follow up tools on a portal – As a follow up to a specific initiative, Cisco puts regularly updated frequently asked questions online; additional resources; who to contact. It also creates communities of individuals to improve processes
- Look to maximise core training and minimise customisation
- Use online tools to survey and support learners one month or three months after the event

#### Maximise impact of face to face components

- Use of workshops and face to face for hearts and minds changes.
- Use classroom to rollout e-learning and overcome resistances e.g. in Manchester NHS Agency, Cisco
- Consider use of classroom in high risk programmes where risk or impact of error is significant: (this is used in BT – some compliance issues supported by face to face workshops with lawyers; Cisco for mission critical IT initiatives ; BA when implementing new systems used classroom but e-learning provided just in time back up and refresher with pre-test facilities to diagnose suitable learning pathway and a master index for direct access to specific areas.)
- Use the class for additional benefits of networking, exploring and discovering in groups, minimise office distractions and to create discipline.
- Use face to face contact with trainers in class to facilitate e-learning, answering and addressing issues on an individual basis
- Increase the skills sets of current trainers – BOC encouraged all trainers to obtain NVQ equivalent standards to ensure basic professionalism at the advent of blended learning solutions. NHS Information Authority created an online e-tutoring programme to enable and inform trainers in best practices of blended learning

#### Mixing media

- Ensure that all e-learning materials are cross-referenced in the classroom e.g. acknowledge and use pre-course work
- Use audio in the mix to increase the reach of learning – recorded CDs were a strong component of a sales initiative by BUPA to reach both senior managers and those on the road. BT created phone based audio training with simple instructions to reach those without access to technology.
- If LMS technology is available, use it to track coaching sessions and other face to face events.
- Use e-testing available for pre and post assessment of knowledge in face to face events.
- Use different blends of learning across different audiences for speed e.g. Marsh implemented a new performance management programme across the whole organisation using a cascading approach: 120 managing directors were reached in eight face to face sessions, 600 other senior colleagues at officer grades were reached through conference style delivery, 6,000 staff were reached with e-learning but supported by senior managers. [continued on page 57 ▶▶](#)

## DISTILLED WISDOM 3 – Contributing factors to successful blended learning

### Create structure

- Develop competency frameworks first with modules needed for each skill then look at delivery strategy.
- Ensure clarity in plans – provide a roadmap for users addressing what do I do now? What do I do next?
- Articulate clear outcomes, objectives and qualifications

### Apply basic common sense

- Do not make content too restrictive in any media – it comes across as patronising
- Blend should be transparent to the user
- Attention to detail is key – integration and timing, cross referencing materials etc
- Take technical advice to address delivery issues

### Implementation success

- Blend communications strategies in with learning strategies – use of video, open days, face to face workshops, giveaways – all impact user acceptance and success.
- Use of centres for invigilation of compliance training
- Address trainer concerns to ensure they have a good attitude towards e-learning
- Get together at the beginning of the course (either face to face or via virtual classroom), explain what and why, demonstrate processes, websites, resources
- Set targets and goals in the first sessions (when is time to first test, when are deliverables due etc)
- Keep achievements personal (certificate/proof)

## Summary of key findings

- Investing in learner support is a must for organisations which are looking for sustainable e-learning strategies.
- Communication of the support available is as important as communicating what learning is available.
- Good e-learning should be intuitive, however teaching learners how to e-learn becomes more important as systems and options become more sophisticated.
- Effective blended learning starts with learning outcomes rather than media – the resulting blend does not have to include both face to face and e-components.
- The final blend will also take into consideration time frames, resource availability (budget, subject matter expertise).
- Online testing and surveys create flow and continuity between blended learning components.

The e-learning in action case studies throughout this report outline examples of effective blended learning practices.

## e-learning in action at B&Q – developing customer advisors

B&Q is the biggest home improvement retailer in the UK with over 35,000 staff across 325 stores in the UK. A strategic objective for HR is to develop their people to support sustainable business growth and best in class customer service. The B&Q University was established to ensure that staff had the right skills and knowledge to achieve this objective and e-learning is an important element of their extensive learning programmes.

The Customer Advisor Learning and Development Framework is one of the B&Q University's core products aimed at developing and retaining new customer advisors (CAs) throughout the business. It has a number of objectives:

To ensure that CAs have the knowledge, skill and confidence to serve and select the right products for customers

To ensure they adhere to consistent business procedures

To provide a career path

To integrate with pay levels.

Historically training of this key audience was inconsistent with stores developing their own best practice. Good development was only available when good managers believed in it. The new learning and development framework was designed to take the gamble away – all employees know what is expected from the job (even before they start, they receive a 'What's my role' document with their offer letter) and their job profile, learning programme and tracker validation is now all on line.

The programme runs over a 26 week period using a combination of e-learning and in store events. It is consistent across all of the stores and the LMS system tracks progress and validation as the CA progresses. On Day 1 the new recruit will attend a welcome day in store and during the first week they concentrate on 'What do I need to do? How do I need to do it?' They will also be issued with a level 1 learning programme and logged onto the internal LMS (known as CAT).

During the first eight weeks, the CA will complete a number of online induction learning modules (including an introduction to e-learning, health & safety, product knowledge and internal processes). Following a face to face review with their manager they will then attend a customer service and review day. Weeks 9 – 13, they will continue with the level 1 programme and once the induction process is complete they move to level 1 pay. More online modules, and instore events occur during the next 13 weeks and at the end of week 26, their levels of skill are validated on line in their first full Tracker session. If the validations show that the CA is below required levels, further learning is prescribed but if they are at standard or above, the CA may progress to the next level.

There are five levels outlined for the CA as they go from knowing their own job to moving through additional job functions before becoming an accredited trainer (level 4) and are able to move into a deputising role (level 5). Each level offers e-learning and other self directed or group learning activities ( according to learning outcomes) and the gateway to each level (and its associated pay increase) is successful validation via the online tracking system.

Throughout the development process, local store training co-ordinators can place workshop details on line and track attendance.

### Results

B&Q uses its LMS to track and manage e-learning course completions. It demonstrated business value by supplying considerable cost savings. It also wanted to show how e-training influenced customer and

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## e-learning in action at B&Q – developing customer advisors continued

employee satisfaction without complex and time consuming measurement strategies. Comparison of the top six stores for e-training usage forms part of the biannual employee and customer surveys (previously proven to impact business performance) and provides useful indications of e-training value that were communicated to store managers and the board.

- The average customer satisfaction index score was 8.53, higher than the average for all stores.
- The average employee satisfaction figure (out of 5) is 3.58 versus 3.52, the average across all stores
- Asked whether they had an opportunity to learn and grow, the average employee score out of 5 was higher – 3.56 versus 3.45 – a statistically significant result
- The top two e-training stores by usage had above average sales results for 2001
- All stores had fewer major accidents reported in 2001 than 2000 (although the overall amount of accidents remained unchanged.)

## e-learning in action at BOC – Increasing sales effectiveness

BOC is the world's market leader for the provision of gas and related industry products. It is attempting to globalize its brand and expand its product lines to increase market share. To facilitate this change, BOC has implemented a capability development programme designed to increase sales effectiveness in one of its core divisions, with the aim of growing and sustaining its business in key geographies.

All customer facing staff, including telesales, counter sales, sales representatives and major account managers were required to have a detailed technical knowledge of the industry in order to understand and advise customers appropriately on new and existing product lines. Methods to introduce improvements in knowledge and sales included a combination of tools, knowledge, and skills and practical abilities. The final programme would not only blend technologies and content delivery, but also blend a range of subjects, processes and work practices.

As a first step, job requirements were evaluated across one region to standardise materials and techniques in order to disseminate and replicate best practice.

The next stage in implementing this strategy was to produce a matrix of skills and knowledge for each customer facing job, initially in one section of the business but then extended to include others.

This matrix would be used to identify training materials required that could be created in small easy to digest modules that could be reusable across different job functions and levels. Delivery methods for the modules included e-learning, practical work, coaching and classroom training. These were developed in-house or externally ranging in length from 30 minutes to three hours.

### Materials developed for the project included:

144 hours of practical modules run in a lab e.g. welding

211 hours of classroom learning

25 hours of e-learning materials

Some case studies ran over two-week period where fictional characters were created and

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## e-learning in action at BOC – Increasing sales effectiveness

learners were tasked to draw out relevant information.

Support tools included the development of an online technical library for internal use

Process and product videos and articles for internal and external use

The materials are sequenced in a linear fashion in order to guide learners who use the matrix through the relevant levels determined by the skills needed by the job profile.

### Encouraging adoption

Generally the attitude towards training was feast or famine, culturally there is reluctance to train with bursts of learning introduced in a reactive fashion. In this environment, a number of initiatives were used to ensure that the capabilities programme was rolled out effectively:

- Engaging global stakeholders at a senior level. For example, in the trial programme the head of sales in South Africa was key in rolling out the programme in that country. Already a believer in the impact that the learning programme would have on sales, he felt that the sales managers would be the key to success of the entire programme. To bring them on board, the head of sales ensured that his managers were the first through the learning. This approach encouraged the endorsement of the programme
- This programme was initiated from within the business allowing the developers to respond quickly to market pressures due to their links with marketing and sales
- A structure of trainers and assessors was created, with all involved undertaking a qualification to NVO level 3 to ensure professional standards were maintained globally. These local trainers acted as champions and influencers.
- To maintain standards globally some flexibility was provided in the way regions were allowed to combine e-learning modules with trainer capabilities in different ways so that local needs could be met.

### Limitations

- This programme has offered sustained success within BOC and has been extended to other business practices. It has delivered these successes in a less than ideal climate. Centralised tracking has been limited to date – the blend of learning has been driven by active trainer participation.
- Technology bottlenecks meant that learning had to be offered by CD as an online solution was not yet available.

### Results

For BOC the success of the programme was indicated by increased confidence and ability to cross sell. One example is of a staff member of 32 years service who had never sold a welding machine, afraid of its complexity. Within days of completing the learning programme he had sold two machines due to his increased confidence.

In the test geography, market share was either maintained or grew following the implementation of the programme – a significant business result for an organisation where it is already the market leader.

From a training perspective, test scores began to increase following the implementation of the programme and the numbers of days in classroom for some courses significantly decreased by up to 60%.

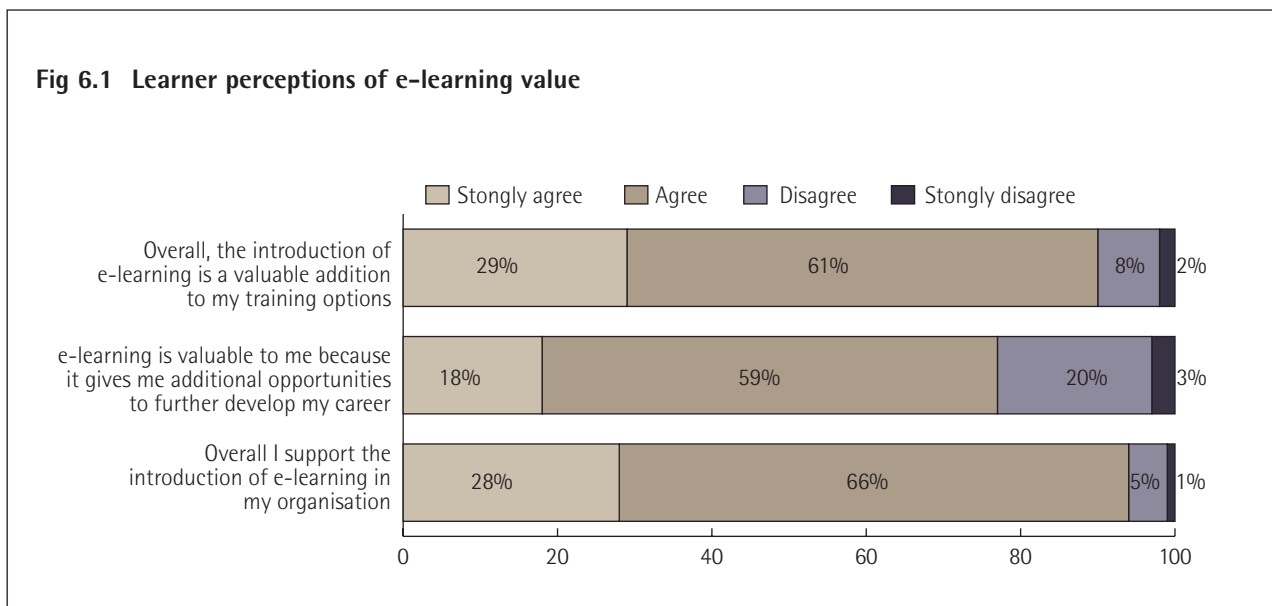
# CHAPTER 6

## Findings and Analysis 6 – Measuring Success

The organisations in this study were invited to participate because of their externally perceived reputation for sustained e-learning success but no pre-defined concept of e-learning success was specified. At a time where considerable emphasis has been given to the evaluation of return on investment, this chapter looks at how organisations define e-learning success and reviews the measurements used to demonstrate results.

### Defining Success

User acceptance is often quoted as a key indicator of a successful implementation by those new to e-learning so this study asked the users directly to determine their views on e-learning value. The responses include the 38% of the users who were team leaders or managers.



94% support the introduction of e-learning in their organisation, 90% stated that e-learning was a valuable addition to their training options, 77% agreed that it was valuable as it offered additional career opportunities (see Figure 6.1). Other findings quoted elsewhere in this report also indicate the users' acceptance of this learning medium (e.g. 89% would recommend e-learning to a co-worker) and its value to their day to day job and career progression (e.g. 90% agreed that they were able to use the learning points in the work place).

The findings indicate that users appear to have embraced e-learning as a tool, not just out of necessity but because it actually delivers personal value.

When we asked the sponsors about their views on their success, 94% of the sponsors agreed that e-learning was perceived to be a success within the business. Perhaps more importantly 94% also believe that their organisation agrees that e-learning makes a relevant contribution to business success. However we did not receive any one clear indicator of e-learning success over and above user acceptance. When asked why is your e-learning successful and how do you know? The sponsors provided a broad range of responses which are summarised in table 6.1 below.

**Table 6.1 Perceptions of success – a sponsor perspective**

WHY IS YOUR E-LEARNING SUCCESSFUL AND HOW DO YOU KNOW?
<p><b>BUSINESS ACCEPTANCE</b></p> <ul style="list-style-type: none"> <li>• Primarily measured by post course evaluation           <ul style="list-style-type: none"> <li>- e.g. NHS Information Authority has average learner satisfaction ratings of 5.95 out of a maximum score of 6.</li> </ul> </li> <li>• Senior Management acceptance           <ul style="list-style-type: none"> <li>- e.g. After viewing the newly developed Heartbeat e-learning in BUPA, the MD wanted all of the board to experience the 'best learning initiative' in his business unit</li> <li>- Word of mouth recommendations               <ul style="list-style-type: none"> <li>- e.g. at CSFB e-learning is now embedded in culture – the business is owning it, requesting feedback from learners and making content mandatory . Usage study hours are all increasing as a result</li> </ul> </li> </ul> </li> </ul>
<p><b>STRONG E-LEARNING STATISTICS</b></p> <ul style="list-style-type: none"> <li>- % of employees accessing e-learning           <ul style="list-style-type: none"> <li>- e.g. Marsh had 85% login rate following the launch of a new LMS</li> </ul> </li> <li>- % of returners           <ul style="list-style-type: none"> <li>- e.g. over 95% e-learners have returned for additional courses in BUPA</li> </ul> </li> <li>- High course completions (when measured)           <ul style="list-style-type: none"> <li>- e.g. NHS Information Authority has completion rates of 93.8% for its e-tutor event</li> </ul> </li> <li>• Increase in use of e-learning           <ul style="list-style-type: none"> <li>- In BT 73% learning is now done electronically</li> <li>- in RBS 60% of learning is e-learning</li> <li>- In Unisys 68% of learning was e-learning in 2002 (compared to 23% in 1999),</li> <li>- Cisco e-learning has increased to about 70% of all learning, with video on demand at 20% , web TV at 20%, web based training at 30%, leaving classroom accounting for 30% of all training</li> </ul> </li> <li>• Cost and volume of training           <ul style="list-style-type: none"> <li>- e.g. Unisys e-learning meant that training spend decreased by 38% but the number of students trained increased by 61%</li> <li>- At Marsh, one impact on classroom training is that improved administration means that courses are run at capacity</li> <li>- Manchester NHS Agency biggest centre for ECDL throughput</li> <li>- BA has achieved annualised cost savings of £6.5m, volumes of learning delivered significantly increased</li> </ul> </li> </ul>
<p><b>MEASUREMENT OF OUTPUTS</b></p> <p>e-learning is aligned to business outputs either formally or informally</p> <ul style="list-style-type: none"> <li>• e.g. Unipart has seen improvements in time to act (see case study)</li> <li>• e.g. B&amp;Q aligning results from top e-learning stores to bi-annual employee surveys and customer statistics</li> <li>• e.g. Cisco product training on e-learning resulted in increased sales, knowledge and confidence</li> <li>• e.g. early studies at Manchester NHS Agency showed that ECDL was saving individuals 38 minutes per day</li> </ul>

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**Table 6.1 Perceptions of success – a sponsor perspective (continued)**

WHY IS YOUR E-LEARNING SUCCESSFUL AND HOW DO YOU KNOW?
<b>COMPARATIVE SUCCESS</b>
<ul style="list-style-type: none"> <li>• <b>Internal comparisons</b> <ul style="list-style-type: none"> <li>- e.g. PwC looked at student feedback following induction training with e-learning and a standard induction programme to see the efficiency of learning – more learners preferred e-learning and believed that it fulfilled the objectives</li> <li>- Surveys – e.g. bi-ennial compliance survey at BT compliance training showed that 37% believed learning effective in 1998 compared with 82% in 2002 when e-learning is standard.</li> <li>- Cisco certifications first time passes were 11% higher with e-learning than with classroom equivalents</li> </ul> </li> <li>• <b>External comparison</b> <ul style="list-style-type: none"> <li>- e.g. C&amp;W looked at its e-learning usage ratios (headcount: courses accessed) and user perceptions of e-learning and benchmarked it against other FTSE companies</li> </ul> </li> </ul>
<b>CREATING NEW OPPORTUNITIES FOR LEARNING</b>
<ul style="list-style-type: none"> <li>• e.g. BT has been able to create and deliver new opportunities for internal accreditation</li> <li>• e.g. BOC uses many of the techniques internally in its customer training programmes</li> </ul>

The focus of these responses shows that, in addition to monitoring e-learning statistics of volume and cost, e-learning success is equally defined as providing incremental training or business value i.e. quality of outputs.

Specifically, only a handful of sponsors specifically highlighted cost savings in response to this question despite the fact that 82% of the organisations measured cost saving. Whilst the sponsors look for value for money and optimisation of investment on a project by project basis, success measurement is seen more in terms of business benefit than bottom line figures.

The participating organisations do not have a systematic view of e-learning success, because the learning successes are defined on a case by case basis in the context of business impact.

### What gets measured gets managed

In addition to defining e-learning success, the sponsors were all asked about the measurements that they used to define success. The responses are summarised in figure 6.2 below.

There is much is debate on the extent that learning impact can be measured, centred around the Kirkpatrick/Philips model of training evaluation<sup>1</sup>:

Level 1: Reaction and/or Satisfaction

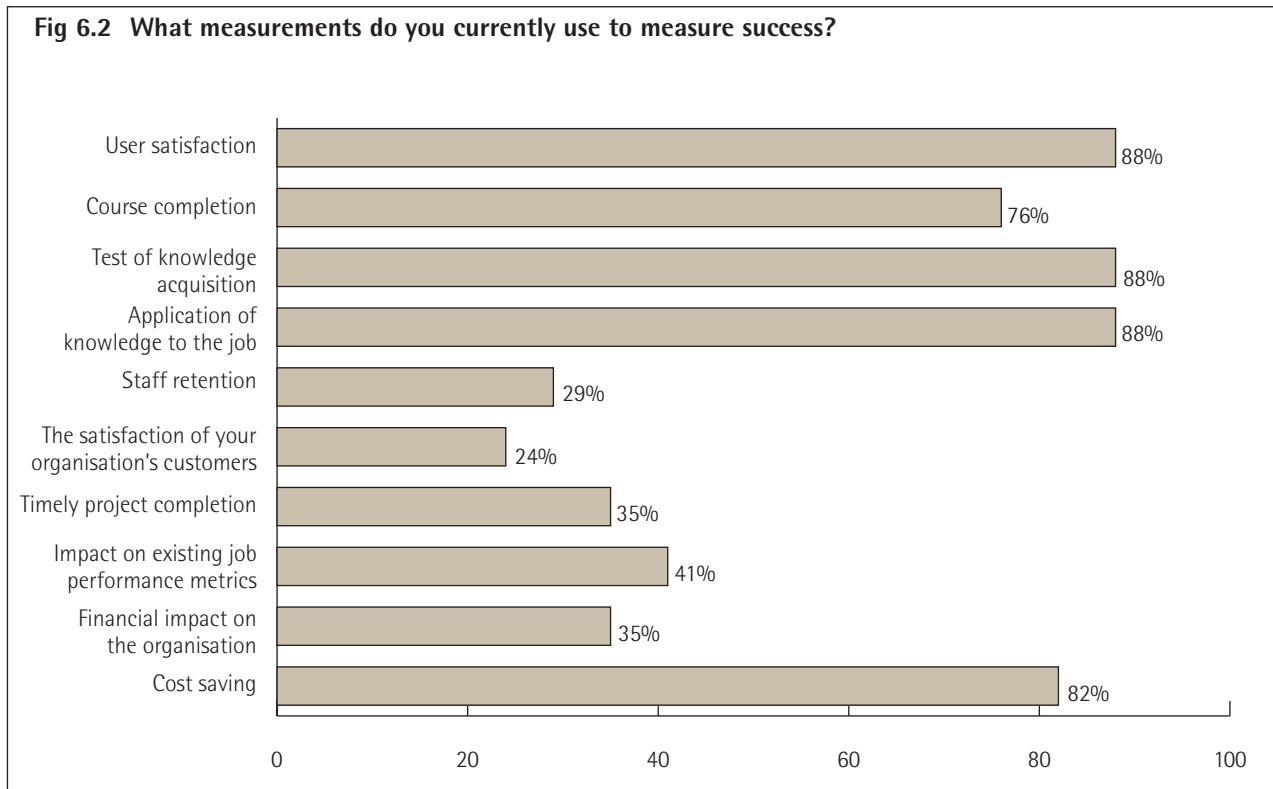
Level 2: Learning (looking at knowledge or skills learned at the event)

Level 3: Job Application and/or Implementation

Level 4: Business Impact (assessing changes in the business as a result of knowledge application)

Level 5: Return on Investment (looking at the monetary value of those business changes)

Interestingly the sponsors within the participating organisations do not believe that they have a rigorous approach to return on investment as they consider that isolating the specific impact of learning let alone e-learning would be too time consuming and not deliver business value.



However, if we consider the measurements used by these participating organisations in figure 6.2 we can see that 88% are assessing impact at level 1 by looking at user satisfaction (using online surveys). 88% are also measuring at level 2, testing knowledge acquisition as a result of the e-learning (using pre and post testing facilities). 88% are also measuring at level 3 – application of knowledge to the job (via an assortment of means such as follow up online surveys one month or 3 months later, management feedback etc).

Assessing business impact (level 4) becomes more complex and will vary from business to business and from project to project. But this study shows that 29% are measuring impact on staff retention, 24% are looking at customer satisfaction results, 35% are reviewing the impact on timely project completions and 41% use impact on existing job metrics as a measure of their learning success. In organisations such as Unipart, learning is closely mapped to measurable work outputs and the impact of one is seen immediately on the other (see case study below). However, this is not the norm and measurements rely on general mapping of learning events to other measured trends within the business. Measurement therefore becomes more anecdotal at this stage (which may account for the varied and lower percentages reported).

35% go on to measure the financial impact on the organisation, (akin to level 5) However, specific measurements at this level are more frequently cited when the e-learning refers to sales performance and product training (see Cisco case study below) but generally results and feedback are also anecdotal at this stage (see table 6.1) with organisations using the information available to provide estimates of values that are acceptable within their own businesses.

82% measure cost effectiveness but as previously discussed, more as an expected by product of effective e-learning rather the focus of it. 76% measure course completions as an indication of e-learning success but there the debate on completions as an ongoing indicator of success will continue to rage as e-learning becomes more modular. The importance of completing courses remains, however it is more of an issue for the learners than the sponsors (see chapter 3).

These results indicate a pragmatic and business driven approach to learning value and measurement. These organisations consistently make the most of available technologies to measure and monitor statistics (feed into Kirkpatrick levels 1 – 3). Business impact measurement is not always used (and not always required by the business) but for specific projects

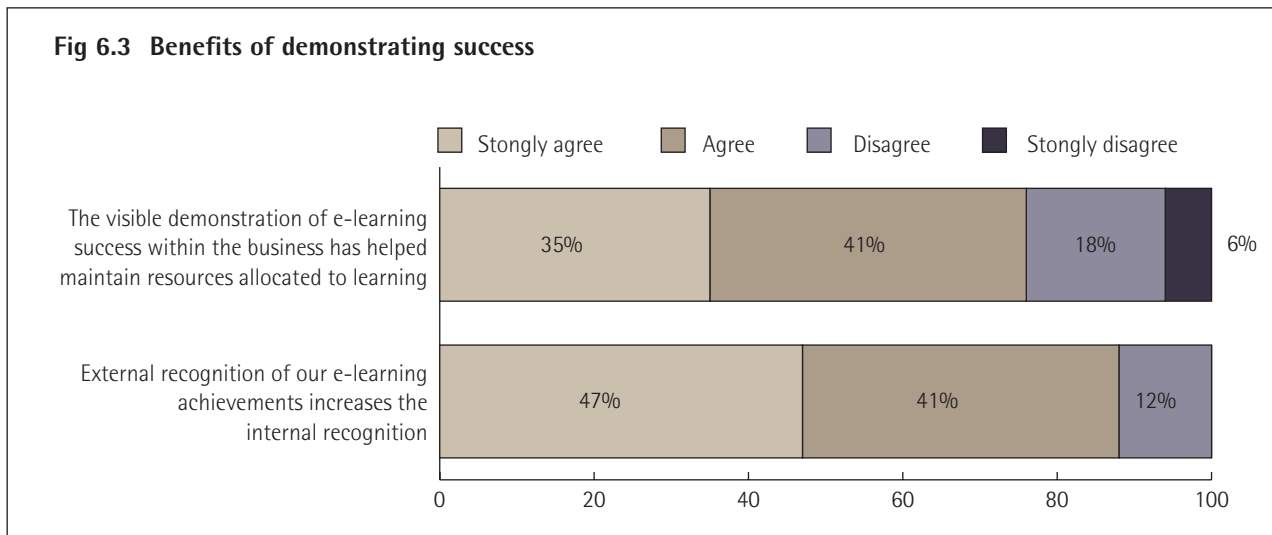
the success criteria (and relevant measurements) are agreed up front with the business sponsors for each key project.

The study found that measurements are more aggressively pursued through the pilot and proof of concept phases but once the programme effectiveness is established, resources are often diverted to other projects.

For these organisations, learning measurement is as much about setting and managing business expectations up front and delivering and reporting against those expectations and is a natural consequence of continued business alignment.

## The value of measurement

Measuring and demonstrating success is a key theme that runs through all of the organisations in this study, feeding communication strategies (see chapter 7), influencing stakeholders, supporting business cases, building credibility and justifying funding and headcount. 76% of the sponsors believed that demonstrating e-learning success has helped to maintain the resources allocated to learning (Figure 6.3).



Clear success measurements linked to business impact have been a significant contributing factor to the many external awards that the participating organisations have won. This in turn has a knock on effect internally. 88% of the sponsors believed that the external recognition of their achievements also increases internal recognition and credibility.

## Summary of Key Findings

- There is no systematic view or definition of e-learning success but the user acceptance of the medium is undisputed in this study.
- Generally success criteria will vary from project to project and are defined ahead of the project with the business sponsor.
- Whilst Kirkpatrick is not followed religiously, the majority of the participants take advantage of e-learning technology to automatically measure to Kirkpatrick levels 1-3.
- Measurements at levels 4 and 5 are often anecdotal but accepted by the business when expectations are pre-defined.
- Effective use of measurement data internally and externally increases credibility and facilitates ongoing e-learning investment and interest.

## E-learning in action at Unipart – integrating learning and business impact

The Unipart Group of Companies (UGC) is a leading European independent logistics, automotive parts and accessories company. The company's philosophy is to understand the real and perceived needs of its customers better, and to serve them better. From the top of the organisation downwards, learning, delivered through Unipart U, is seen as a critical component of building stakeholder value and competitive advantage.

*.... Unipart U's mission is "to develop, train and inspire people to achieve World Class performance within UGC and amongst its stakeholders".*

*"The Unipart U has become the platform from which we can see the direction for the future. There's a good commercial argument for it; it's a route to competitive advantage and it enhances shareholder value by preventing our people's skills from becoming obsolete."*

*John M Neill, Group Chief Executive*

Learning is visible from the home page of the website and Unipart U is the first experience that any visitor or staff member has from the moment that they walk into the head office.

As a result of this emphasis the learner is encouraged to own his or her own learning and has the responsibility to keep knowledge up to date and to build personal capabilities that will lead to increased performance and innovation. Frank Nigriello, Director of Corporate Affairs, outlines that as a group of companies UGC 'encourage innovation by design and not serendipity' through a web-based team problem solving programme called 'Our Contribution Counts Circles'.

The organisation 'understands systems thinking, and uses it' and it has a number of initiatives that encourage everybody to act in an empowered way e.g. 'Our Contribution Counts Circles'. Every activity has a learning component and staff are encouraged to learn in the morning and apply that knowledge in the afternoon.

In this context the success of e-learning initiatives (online courses implemented through the virtual campus arm of Unipart U) are judged by business results rather than complex tracking mechanisms.

Unipart does not believe that the company should track all learner progress as this would encourage learners to measure the input (the course) rather than the output (the performance improvement). Instead, learning is owned by the learner and the manager and is 'pulled' down from the system rather than 'pushed' out. This process is a natural extension of the work philosophy that has been embedded throughout the organisation since 1993. The Virtual campus is a means to provide an environment to practice 'learn and do' – offering a variety of learning content and support systems such as problem solving tool kits. As a result, a review of learning management requirements in 2001 led to a decision to keep the reporting behind e-learning to a minimum. Test results are not measured. Learning is an essential part of day to day working.

In this environment, how is e-learning success judged? Unipart uses a number of mechanisms:

Unipart Advanced Learning Systems is a consultancy arm of UGC that specialises in learning and knowledge development. Unipart Advanced Learning Systems applies the continual improvement philosophy of the organisation to the delivery of e-learning. The content is designed with constant feedback from users. Feedback before during and after the design and implementation phases ensures all new content works for the users and their managers. Success is therefore implemented at the design phase and is linked to specific business improvement measures.

Learning is implemented in response to identified and measurable business needs. Through visual management systems called Communication Cells, the organisation continually measures daily outputs of quality or innovation as part of its ongoing management processes and those outputs are used to monitor the impact of e-learning as it is implemented.

Does quality, creative ideas or improvement increase as a result of a specific programme?

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## E-learning in action at Unipart – integrating learning and business impact (continued)

Are problems able to be solved faster (measured through the 'Our Contribution Counts Circles')?

The 'Our Contribution Counts Circles' programme had consistently demonstrated that teams working through a shared, structured process of problem solving achieve fast results that are implemented effectively and deliver sustained improvement. Key measures such as financial benefits, timescales for improvement and number of employees engaged in Circle activity are maintained on the company's intranet and available to all employees. A key measure is cost saving within the business and on average over £2 million has been saved every year since 1997.

The quality improvement process is continued with a short online survey that follows each learning intervention asking a few key questions for feedback that links back into the system, highlighting where changes may be necessary:

- Did the course teach you anything you could put into use straight away?
- On a ten(d) to zero scale, please rate your knowledge before taking the course.
- On a ten(d) to zero scale, please rate your knowledge after taking the course.

The following provides a specific example of e-learning success within Unipart. UALS designed an e-learning programme for van drivers in order to increase confidence and to better equip the drivers to deliver products efficiently to customers. The drivers are one of the main customer interfaces for Unipart Automotive, and yet the company was experiencing a 70% turnover rate in this population. The needs of that population were identified with the managers and drivers and specific e-learning modules were created for the audience and implemented. Although the van drivers had issues using PC technology, branch managers were able to act as coaches to help the drivers overcome the obstacles. As a result, the turnover rate dropped to less than 40% and customer satisfaction increased.

The experiences at Unipart show that as learning is embedded within existing work practices existing business measurements become valid indicators of learning impact.

## E-learning in action at Cisco – a pragmatic view on ROI

Cisco offers e-learning and online performance support tools as standard to all staff as part of its objective to ensure that everything they do uses technology to drive productivity and flexibility.

It has a strong focus on functional areas and offers portals around job functions for groups such as manufacturing, sales, engineering etc. These portals also contain breaking news items and search facilities. Sales and technical staff have updates at their fingertips so that they can refresh their expert status at any time. To address formal learning and development, staff can also link into 'my development', assess themselves against competencies and their manager then approves the learning that is needed.

Learning content can take a number of different forms at Cisco, many of which are used as simple performance support tools as well as being blended into broader learning solutions.

- Video on Demand (VOD) – a quick route to deliver high level messages which are then recorded and stored for staff to dial in and replay at any time.
- IP TV – planned monthly broadcasts, sponsored at a senior level which are then captured and rebroadcast as VODs. The broadcast is interactive, allowing staff to ask questions, either directly, or via a moderator who summarises all questions to prevent the flow being interrupted
- E-learning:
  - Web resources such as: technical product updates, white papers, web links to databases capturing relevant information etc

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## E-learning in action at Cisco – a pragmatic view on ROI continued

- Web based learning events (with increased interactivity and engagement)
- Simple screen shot captures, hyperlinks and text documents

- Classroom learning

With this extensive profile and investment in e-learning, Cisco uses a range of measures and methods to demonstrate the success of its e-learning initiatives, and if appropriate, allocate a return on investment figure for use both internally and externally.

For example, Cisco implemented a CCNA/ICND certification programme with e-learning and compared the experience to the equivalent face to face classroom programme in a specific pilot where 100 students studied with instructor led classroom courses and 100 with e-learning (using a variety of modes). It found that whilst 77% passed the certification exams first time with the classroom, 88% passed the exams first time with e-learning. It also found that the learner feedback was significantly higher with e-learning.

This level of measurement and comparison uses both hard data (facts and figures on first time pass rates) and self evaluations and is particularly important for Cisco at the initial stages of a new e-learning project. The measurements not only demonstrate value but they increase learner confidence in the programme as the results are disseminated.

In another example, Cisco applied e-learning extensively to its sales and support staff and made use of self evaluation to continue to monitor and benchmark relevance and usefulness of the courses. As data is gathered over time it becomes a more accurate reflection, overcoming personal biases that may occur on an individual basis. Following a spike of personalised sales training and development, it found that knowledge confidence had increased 30% in account managers, 87% would be willing to take another course and questions that looked at the applicability of learning to the job and courses matching job responsibilities scored equally high.

Cisco also observed a number of trends 3 – 6 months following this initiative including an increased tendency to use online resources for product related competencies and more importantly, product sales increased by approx 40 – 50%.

It is difficult to isolate the impact of the e-learning on the performance increases but combined with the ongoing self evaluations, a clearer picture begins to emerge and measurements become more reliable.

In the US, Cisco has also used self assessment surveys to evaluate time efficiencies and ask staff to estimate time saved in the job as a result of the new skills. These estimates are then used (cautiously by selecting the lowest values in all cases) to calculate a monetary value which contributes to the return on investment argument<sup>2</sup>.

At the same time as reviewing the quality of the learning experience, Cisco has also looked at typical cost avoidance and time efficiencies and it found that the time to complete the training reduced by 25-50%, travel costs were avoided for many courses, many live courses were delivered via video on demand which released additional time, cost of books and production reduced as more content was posted online and the time spent on partner training also decreased.

Measurement of return on e-learning investment will never be 100% perfect. The time and resources required to isolate and compile accurate data at the required level is beyond the capabilities of most organisations. However Cisco has found that combining data from reporting systems with intelligent surveying questions for self evaluation build a picture over time that is dependable, justifying continued investment to all key stakeholders.

### FOOTNOTES

1. Jack J. Phillips/Ron Drew Stone, *How to Measure Training Results*, McGraw-Hill, 2002

2. see 'Proving 900% ROI' at [www.workforce.com](http://www.workforce.com), August 2002

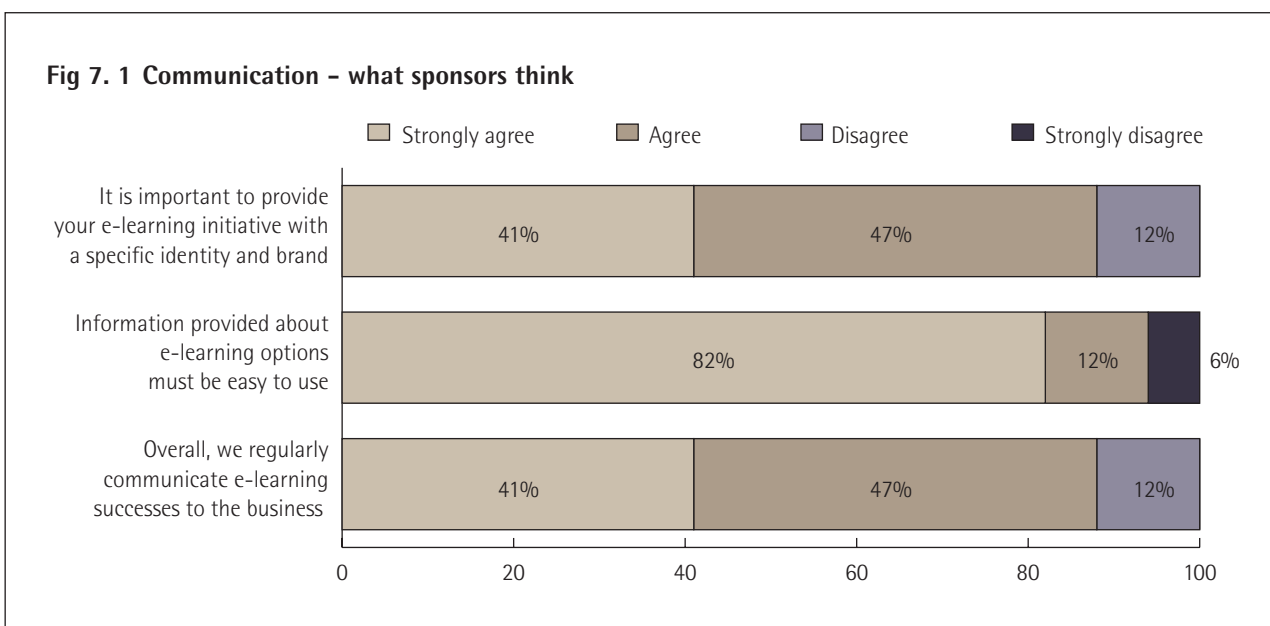
# CHAPTER 7

## Findings and Analysis 7 – Winning Hearts and Minds

So far, this study has looked at the ways that organisations are linking learning to business and the business acceptance and engagement that has resulted from these activities. This chapter uncovers a further range of communication and complementary change management strategies used by organisations to win hearts and minds of the stakeholders and how these are adapted over time.

### Communication strategies

All of the sponsors within the participating organisations used a plethora of different communication techniques throughout the different phases of their implementations in order to engage, inform and influence the key stakeholders. For successful e-learning organisations, planning effective communications is essential, not an optional extra.



This study found that carefully considered communications strategies extended beyond the process of simply launching e-learning. Alignment of e-learning to business strategy (highlighted in Chapter 2) relies on close communication with the business stakeholders at each phase. Chapter 5 highlighted the multiple routes of communication used to support the learner during the learning process and Chapter 6 looked at the role of communication of ongoing success to ensure

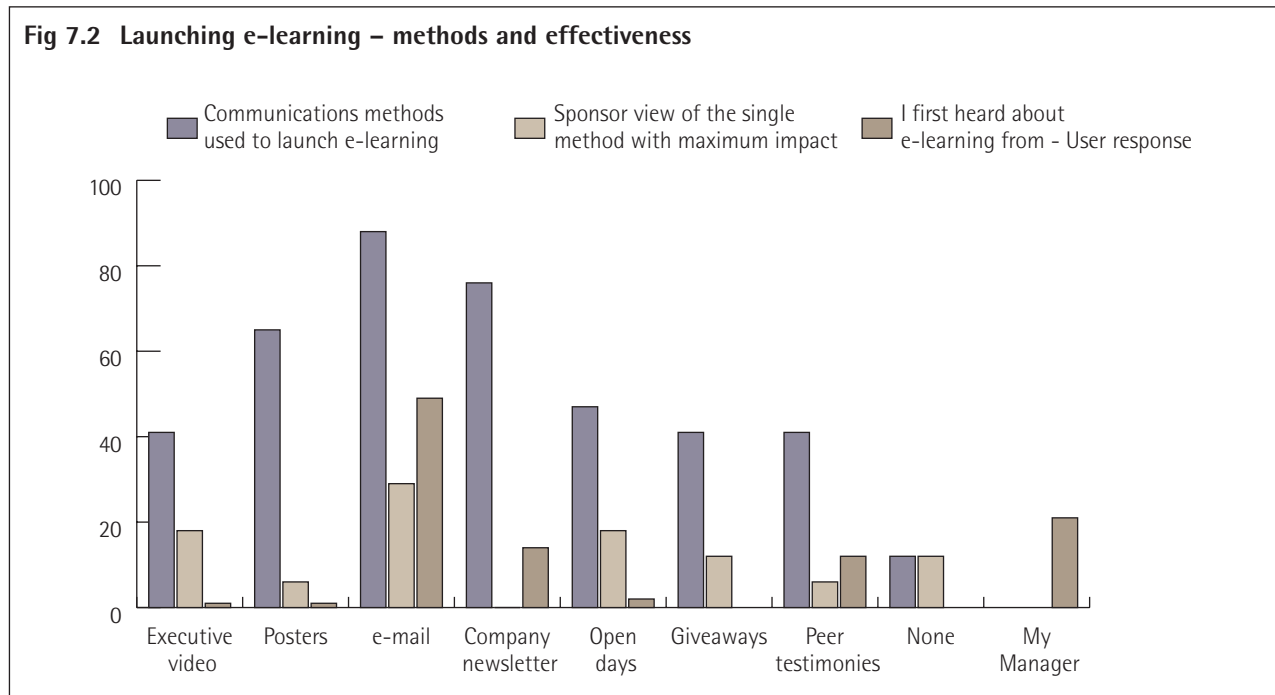
continued support. Overall, 88% of the sponsors agreed that they regularly communicated e-learning successes to the business, continuing the communication process following launch initiatives to ensure continued support of the learning programmes (see fig 7.1).

The sponsors also indicated that simplicity and clarity are at the core of their most successful communication programmes with 94% agreeing that information about their e-learning options must be easy to use. With 88% of the sponsors agreeing that it was important to provide a specific identity and brand, they often turned to marketing and communications specialists either externally or within their own business for advice and resources.

This chapter specifically looks at the communications strategies used to launch e-learning and engage users with new and existing content.

## Launching e-learning

When launching a new e-learning initiative, the sponsors did not rely on a single communication route. Figure 7.2 outlines the modes of communication used and on average the sponsors were combining four or more different communications methods to launch a programme. We also asked the sponsors which single medium had maximum impact in their view and compared this with the users' feedback on where they first heard about e-learning.



Unsurprisingly, with the ubiquitous use of e-mail, 88% of the sponsors used e-mail within their launch campaigns and 29% of the sponsors felt that it was the single medium with most impact. This view was endorsed from a user perspective, e-mail was by far the most influential medium for increasing awareness with over 49% of the users claiming that they first heard about e-learning via e-mail.

When launching e-learning, company newsletters were used by 76% of the sponsors. However compared to other media, this was not considered to have significant impact by any sponsor, however 14% of the users first heard about e-learning via this medium, indicating that the investment of time to create entries and adverts certainly pays off.

In terms of content, 41% of the sponsors used peer testimonies to help launch e-learning, with inputs often taken from learners within the pilot studies. These would be circulated via e-mail or in company newsletters. 12% of users claimed that they first heard of e-learning through the testimony of peers indicating that both formal and informal dissemination of user opinions about e-learning should be actively encouraged in the launch phase.

65% provided visual impact by investing in the design of posters (mainly for use in frequently accessed locations such as lifts, central notice boards, coffee points, cafeterias etc) and 6% of the sponsors believe that this medium was the most effective. Only 1% of learners first heard about e-learning via posters indicating that it is important that e-learning initiatives are not launched via posters alone. It is likely that their main benefit is endorsing messages, building brand visibility and maintaining awareness.

41% of sponsors involved executives in their e-learning launches via video clips either on the intranet or in an open day launch in order to demonstrate business sponsorship. A relatively high 18% of the sponsors felt that this was the communications method with most impact. Only 1% of the learners first heard about e-learning in this way but given that 7% of the learners felt that the senior executive opinion would be the most influential (see chapter 3, figure 3.4), the involvement of executives in the launch process is likely to play a more important role in endorsement and credibility rather than raising awareness.

Face to face contact at the launch was considered very important by a number of sponsors in order to provide the human element to a predominantly technology solution and to answer questions that will increase confidence. Open days in key parts of the organisation were used by 47% of the sponsors and 18% of the sponsors believed that this had the maximum impact with users. Only 2% of users first heard of e-learning via open days but communicating via open days is more likely to build confidence and remove barriers to access than create awareness.

41% invested in giveaways such as pens, mouse mats, stress balls etc. They particularly were used for re-branding exercises and 12% of sponsors felt that this was one of the most effective methods for impact with users as the giveaways were often fun and motivational and provided an ongoing reminder of the services available.

From a user perspective, a high 21% first heard of e-learning directly from their managers. These findings indicate that managers are the second most influential communication route, after e-mail, for raising user awareness. Whilst a number of the sponsors specifically target managers as a means of reaching users during an e-learning launch, this is an area that deserves increased attention given the influence that managers have over their staff ( see figure 3.4) . Those that targeted managers with specific communications campaigns used e-mail and provided other resources (such as a binder or intranet resources) to help managers position e-learning within the context of their own teams.

Overall, this study indicates that effective launch strategies involve multiple communication routes as they each have strengths in addressing different requirements – raising awareness and providing information (via e-mail, posters, and giveaways), building credibility (through executive endorsement and student testimony) increasing confidence and overcoming technology barriers (through face to face events) and influencing behaviour (through management endorsement and support).

### E-learning in action at Marsh – launching a new LMS

Marsh, a leading insurance and risk services firm with 38,000 colleagues worldwide, had an extensive history of offering business focussed technology based training products through a network of open learning centres. The decision to implement an enterprise wide LMS solution was driven by a need to create a management structure for training administration – of increasing importance with extensive regulatory initiatives in finance – and provide an environment for staff to manage and own their own performance in line with new performance management strategies implemented across the board (see case study chapter 2). In addition the new LMS consolidated classroom offerings and provided a centralised point of reference and resource for all learning and talent management materials.

Whilst of significant business impact, not all of the learning offered through the LMS was mandatory and it was important that both managers and employees understood the personal significance of the new LMS initiative and the courses available to them.

In order to achieve this, Dawn Griffiths, head of e-learning Europe, realised that she would need to embark on an extensive communications programme and enlisted the help of the corporate communications group for advice two months prior to rollout. This provided the time needed to plan and resource the communications campaign.

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## E-learning in action at Marsh – launching a new LMS continued

A design company was also engaged to help communicate the feeling and vision behind the LMS rather than focus on functionality of the new system. It used the analogy of food to draw people into the new technologies. Various messages were used to help raise the profile of learning:

- 'Feed your mind (realise your potential)'
- 'A healthy diet for the body is based on differing food groups – likewise the mind needs different learning experiences'
- 'Food for thought'

The communications campaign drip fed messages to the audience worldwide using a number of different media:

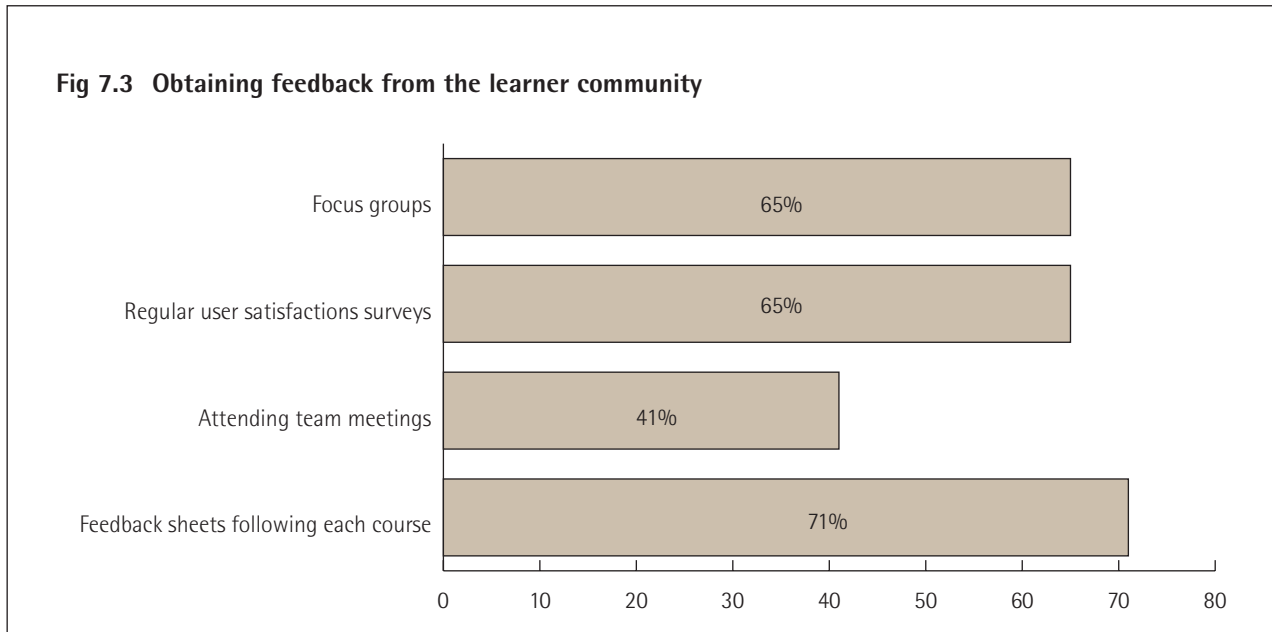
- E-mail
- Tray talks – using tray liners for the lunch trays
- Messages on sandwich bags for take away lunches
- Desk drops in the design of a sophisticated restaurant menu
- Quick reference guides – designed with index tabs directly corresponding to the LMS interface for ease of use.



The impact of the launch communications campaign was endorsed by the volume of users around the globe – over 85% of learners accessed the LMS in the first year.

## Maintaining interest

These participating organisations have been using e-learning methods for significant periods of time and whilst new initiatives have been launched within that period, the majority of the organisations continue their communications campaigns beyond the launch in order to maintain awareness and inspire interest. Figure 7.3 shows the communications methods used by sponsors to maintain interest.



Continued communications are considered to be vital by the majority of sponsors as other priorities in everyday work fight for users attention and they need to be constantly reminded of services available.

88% continue to use email with 29% feeling that it continues to be the strongest medium for communication. E-mail is a strong communication medium and can provide both personalisation and increased relevance for recipients by allowing recipients to link directly through to content. The prevalence of medium however can dilute messages and a number of sponsors have found different ways of getting around this:

- E-mail messages tailored to the specific business area and then sent directly from senior managers or sponsors in that area to grab attention.
- When micro processes are being changed or updated, Cisco will adapt the online resources and then will use push technologies such as pop up boxes with links on the staff's home page to advertise and direct them to the changes
- BT uses pop up boxes with direct links to new content or BT Academy on frequently used intranet sites.

After e-mail, company newsletters and posters continue to be strong communication channels for maintaining awareness and interest although peer testimonies are also used extensively in this stage (by 47%) to endorse results and encourage further usage. Generally peer testimonies will be published in company newsletters but other media are also used to create learning heroes within the business. For example

- B&Q features users in ongoing poster campaigns
- Unipart videos the testimonies of interesting users,
- Manchester NHS Agency uses award ceremonies to publicly share success stories

## E-learning in action at CSFB – continually creating buzz

Credit Suisse First Boston, the global investment bank with 20,000 staff worldwide has been using technology-based training for over nine years. Over that time, the implementation of e-learning has continued to adapt as technologies become more reliable and the business has increased its acceptance. Now learning is offered in open learning centres, over the intranet and via the internet for home use. It offers generic content and company specific programmes for all staff which integrate with graduate intake, induction processes and regulatory initiatives.

For CSFB, the learning is linked to divisional competency and curricula. When setting personal goals with staff, managers are encouraged to look first at e-learning where existing content is already available 'free' to the lines of business. Despite the integration into business process and the added incentive of no internal charge for learning, Diane Oswell, VP and head of global e-learning at CSFB, has an active and aggressive marketing and communications campaign to continually create buzz within the business.

People contact is at the heart of the marketing and communications campaigns – in the fast paced culture of the bank, face to face meetings allow messages to be tailored to the business audience. Ongoing communications are centred around new launches of materials, upgrades and promoting existing resources to address a current business issue.

CSFB uses a number of communications and awareness techniques:

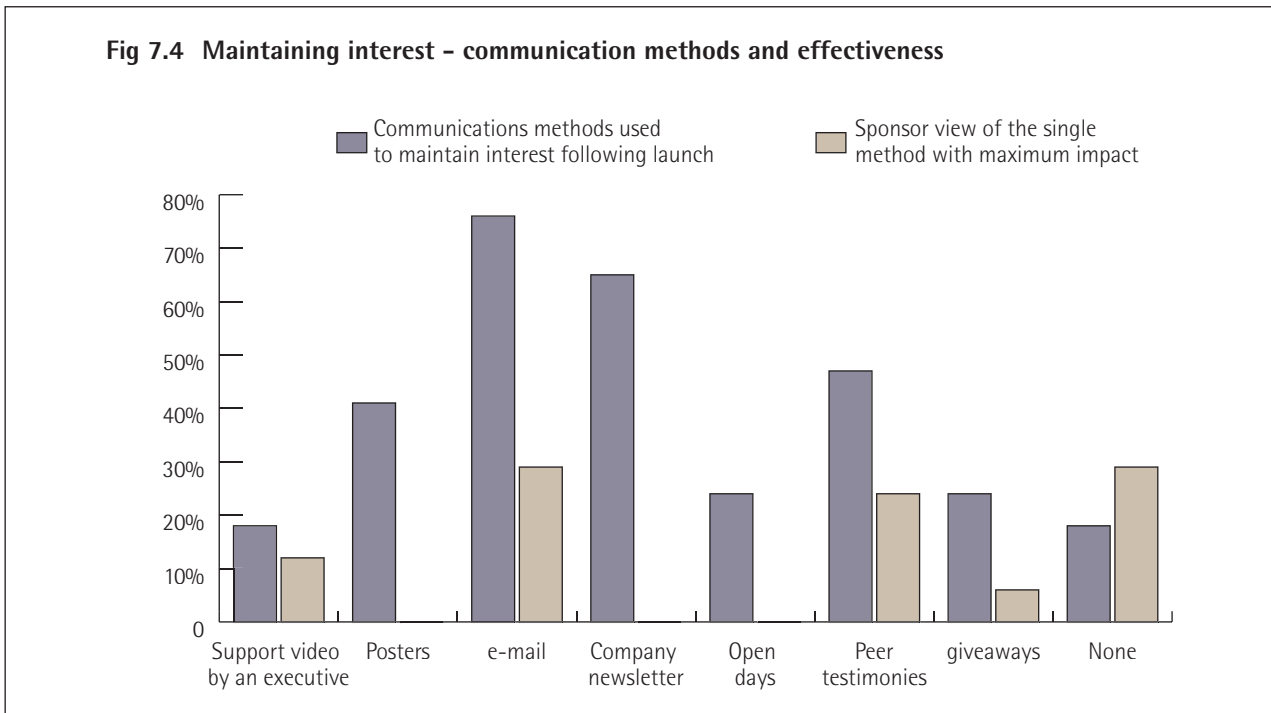
- When launching a new product, CSFB will use the open learning centres (OLCs) as a focal point and will create interest in advance by announcing events ahead of time and provides e-mail reminders on the day.
- CSFB includes the OLC as part of the induction programme so that new recruits are familiar with e-learning and see it as standard practice as they move through the business.
- The OLC hosts events linked to other initiatives such as diversity e.g. a tapas event linked to National Hispanic month was held at the New York OLC which promoted both learning and diversity within the organisation.
- Personalised e-mails addressed to individuals are used to announce new courses.
- Multiple routes are used to disseminate information are a priority e.g. the HR department will endorse a programme, but the business head of department will be encouraged to recommend action.
- Giveaways such as stress balls keep a fun element in the outreach to staff.
- Diane Oswell regularly meets with department heads to ensure relevance of the e-learning offering and regularly reports quantifiable measurements to senior management to demonstrate success.

As a result of ongoing communication, usage study hours are continually increasing and the implementation of e-learning at CSFB is now embedded within the culture of the business. Business units now demand e-learning and request more modules for mandatory curricula.

## Communication – a two way street

Another key finding of this study is that the sponsors actively seek feedback from the learner (and business sponsor) community and embed that feedback throughout the e-learning implementation process. A number of methods were used to collate feedback and on average, these organisations were gathering feedback from two or more sources rather than being reliant on one feedback mechanism.

71% used feedback sheets (mainly online) that looked not only at satisfaction but also questions of design in order to identify issues for improvement.



65% used internal surveys to obtain feedback – either including indicators within standard employee satisfaction surveys or conducting specific research internally to review the impact and perception of e-learning. 65% also used focus groups with learners to identify and isolate specific issues, requirements and improvements. (see RBS case study below)

41% regularly attended business team meetings – this smaller number may be due to an indication of time available, size of the organisation and level of relationship with the business. The sponsors who sit within lines of business are more likely to be invited to attend team meetings where they have the opportunity to position learning within the context of the business. Anecdotal evidence from sponsors within larger organisations with centralised training functions, suggests that they are more likely to meet with business sponsors on a one to one basis rather than attending team meetings.

Generally, despite size or complexity of the business served, the sponsors agreed that face to face communication with business managers – listening to issues and offering solutions – was a high priority in order to build credibility, commitment and confidence. Technology had provided many of the sponsors with time savings and this saved time is predominantly being invested back into direct communications with the business.

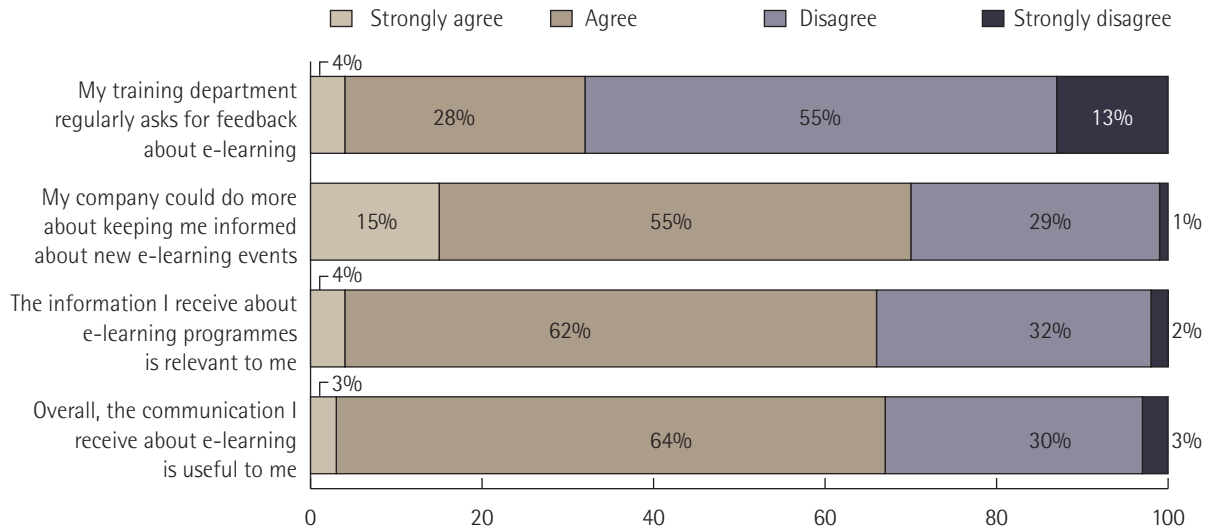
Areas that were highlighted for improvement included course content, time available for learning, course length. The sponsors indicated that, where practical, they would embed changes and recommendations in course updates or in new content production. However few then went back to the business to let them know how they had responded to and acted on the feedback.

Despite a number of feedback mechanisms in place, learners in general do not perceive that their organisations are regularly asking for feedback. Only 32% of learners felt that their feedback was requested (see fig 7.5) indicating that either they do not recognise current feedback processes or that the current processes are not reaching them. Learner feedback is predominantly gathered through surveys due to the volumes involved and this finding may highlight the importance of increasing the profile of face to face communications if the learning organisations want to actively demonstrate that they are listening and responding.

From a learner perspective, 67% agree that the information that they are provided with is useful to them, 68% agree that the information is relevant. Compared with the findings in figure 3.1 where 90% said that they were able to apply the learning to their jobs, it would seem that there could be a mismatch between learning design and the alignment to business needs and the final communication behind the learning. The final communications in some instances may miss the core relevance of the material to the learner.



Fig 7.5 Communication – what learners think



Finally, despite concentrated communications efforts on behalf of the sponsors, there is always a thirst for more – 70% of learners felt that their companies could do more about keeping them informed. This was succinctly summarised by Phil Knight at BUPA who paraphrased John Kotter:

'Whatever communications you do, you have probably underestimated by at least a factor of 10!'

### E-learning in action at RBS – embracing feedback to deliver results

The Royal Bank of Scotland has 126,000 employees worldwide and offers a range of e-learning solutions to support specific business initiatives. Strong and clear communication processes are essential for RBS in the development and implementation of e-learning and clear systems are in place for communicating with stakeholders and obtaining feedback in order to spread best practice within the group. Communication and feedback is an essential component of the development and promotion of e-learning within the business and of the learning itself.

In one project within the Retail Bank, the organisation had identified a number of key roles for customer facing staff and was looking to create learning programmes that would provide consistency of core skills that would improve performance and ultimately contribute to an increase in sales.

In order to achieve this, the learning and development team from Human Resources in partnership with the business sponsors identified a number of Customer Service Officers, recognised in the business for their service excellence, and invited them to form a focus group. The group was locked away together with the training team for a number of days in order to provide full feedback on what was needed from their job, what are needed and what training is required.

From this feedback, the learning objectives and points of the training programme were created and the e-learning team then reviewed most appropriate delivery mechanism.

The resulting programme consisted of:

- Knowledge acquisition modules which were online for consistency and speed.
- Online testing, used to assess knowledge and provide feedback on knowledge acquisition,

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## E-learning in action at RBS – embracing feedback to deliver results (continued)

with 30 random questions taken from a database with 80% pass mark. If the learner failed to reach the pass mark they were locked out for 24 hours.

- Classroom components were used for skills practice, and cut down to 1.5 days. PCs were still used in the classroom to simulate the branch environment, the assessments for each session were also reviewed in the classroom sessions and the feedback used to address skills issues.
- Once back at branch, skills and knowledge are supported by:
  - Performance support and reference materials online for both managers and learners
  - Virtual classroom which used the bank's already installed satellite system delivered interactive sessions with subject matter experts

Following the learning initiative, the leads generated by the staff were measured and, compared with lead generation in the six months prior to learning, leads had increased providing tangible evidence of the success of the programme.

## Communication Essentials

*'Communications should be orchestrated – start centrally and orchestrate out using all channels, listen hard, act on what you've been told and show them that you have changed'*  
Frank Nigriello, Unipart

The findings of this survey endorse these comments and the Distilled Wisdom 4 table highlights insights from the sponsors on effective communication strategies that help to win hearts and minds.

### Final thoughts on managing change

88% of the sponsors agreed that if e-learning is to succeed within an organisation, it is critical to have a change management programme embedded within the e-learning strategy.

There are many recipes and guidelines for change management but many follow a linear approach which often over simplifies a complex issue. Change can be incremental or be transformational in a business and there are a number of change leadership styles behind successful change. There is no one size fits all approach to change management, culture shift and communication as it applies to learning. However there are some common principles from the change management theories<sup>1</sup> that are consistently useful in the learning and development context:

- Creating a desirable vision for the future

### DISTILLED WISDOM 4 – Communication Essentials

Think about the communication message

Have a clear objective about what you want to achieve with communication. Do you want recipients to be informed, persuaded, to act?

Keep it relevant and simple

People respond to learning and results, not technology features

Ensure consistency to avoid dilution of core messages

Repeat messaging from different angles

Talk about business not training

Be clear about next steps

Mix media for maximum effect

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## DISTILLED WISDOM 4 – Communication Essentials (cont.)

Use existing communications media within the business – company newsletters, payslip flyers, communications boards (physical and virtual), team briefs, relevant intranet sites etc.

Use the unique qualities of e-mail to ensure maximum impact – personalisation, ability to link directly to content or relevant resources to avoid messages being lost.

Communicate results frequently

Consider how to share peer testimony – video, interviews, posters

Use league tables with tangible facts and figures for management

Use face to face communications – open days, team briefs, one to one meetings – to build confidence and commitment

Create visible and practical methods for gathering feedback

Communicate changes arising from feedback

Make it fun

Leverage resources and expertise around you:

- Internal marketing and communications departments for advice, design expertise and resources
- Vendors can sometimes share best practice, offer giveaways and can help quantify learning results
- Use external resources to run focus groups to gather honest feedback and demonstrate commitment to listening

Don't communicate until the technology works!

Consider external PR

Newsletters, journals, internal and external with tailored messaging e.g. NHS INFORMATION AUTHORITY publishes programmes in all publications that their own audiences will read (e.g. BMA, Health service media)

Communicate internally any external recognition of best practice e.g. award wins, published case studies as this helps to build internal credibility.

For global communications strategies – create centralised resources but offer implementation guidelines using a mix of media and then work with local territories for localised implementations.

- Establishing urgency
- Creating a guiding coalition
- Creating practical actionable first steps
- Communicating change
- Building on action and success
- Developing a capacity to learn and adapt

Throughout this study we have highlighted how these activities have been actively embraced by the participating organisations and have contributed to success. However, following a fully managed change management model has not necessarily been a conscious decision. Carol Hulm at NHS INFORMATION AUTHORITY summed this up by saying 'we did not consciously consider a change management process but looking back the language of change management is just a fancy way of describing what we do on a day to day basis – it is necessary but invisible and we do not want to draw attention to it'

This study has presented an number of change management strategies that have been used but the final section of this chapter reviews further approaches to change management used by the participating organisations to win hearts and minds of the business.

### **Embracing or changing culture?**

The issue of change management often arises when organisations are talking about changing an approach to learning, or changing the culture of the organisation towards self development and personal performance management.

This study found that many participating organisations sought to actively embrace the culture of the organisation in the implementation of e-learning in order to effect necessary changes in learning behaviour. Table 7.1 shows some examples

**Table 7.1 Aligning e-learning with corporate culture**

COMPANY	DESCRIPTION OF BUSINESS CULTURE	EXAMPLES OF ALIGNMENT E-LEARNING TO CULTURE
Unipart	Empowerment, creating capability in the business by helping staff to constantly overachieve.	'learning and do' philosophy. Learners own their own plans – creating a pull strategy for learning. Test tracking and monitoring is kept to a minimum.
BUPA	Paternalistic, care for employees,	e-learning decision processes are considered and people-focused, highlighting investment in people. Development agenda strongly aligned to overall strategy
B&Q	Pragmatic culture, vocal, expect respect, can do spirit, management by results	B&Q uses own staff on e-learning CDs and videos. Practical outcomes of learning and rewards are highlighted in communications.
C&W /PwC/Unisys	All are global organisations with different cultures	All organisations provided flexible guidelines for e-learning implementation that can be adapted to local cultures e.g. use of management approval for e-learning may vary across countries, promotion of material, local blending of e-learning is able to be varied across the business
Cisco	Quality teams, open communications, empowered staff, driven by customer success	e-learning was a natural extension of the internal use of the internet to drive business performance
RBS	Merging of cultures in two banks Diverse culture across business	e-learning provided choice and diversity across business
CSFB	Entrepreneurial, fast moving, innovative, intelligent. A culture of using technology	E-learning provides fast access to materials at the desk

of this.

In certain circumstances the implementation of e-learning was completely counter to the culture of the organisation, for example in the Manchester NHS agency, the potential audience for ECDL training came from completely diverse cultural backgrounds. However, they found that their implementation of e-learning transcended cultural differences and helped to break down barriers with consultants learning happily alongside porters. In this instance e-learning became an agent for change in its own right.

## The role of brand

88% of the sponsors agreed that it is important to provide your e-learning initiative with a specific identity and brand. Branding for these organisations represents more than a new label for an old department. Branding will often accompany a strategic change in learning and development philosophy of which e-learning is an integral component. The participants provided a number of benefits linked to the process of branding the learning initiative:

- Avoid confusion with all e-learning jargon
  - e.g. BUPA – branded its site as PLATO (Personal LEarning and Training Opportunities) to avoid confusion

within e-learning terms.

- Provides one easily recognised source for all learning resources.
  - e.g. BT Academy pulled all e-learning and classroom initiatives together
- Branding often accompanies a complete change in learning and development philosophy and an increased alignment to business strategy. Branding helps to remove the traditional training reputation and change the perception of the business community.
  - e.g. Learn BA – represented the new alignment of learning and development to strategy. Within this context, the brand represented the centralisation of disparate learning functions and provided the audience with one easily recognisable central place for all learning needs.
- Assists becoming an employer of choice and the competitive advantage that can bring
  - e.g. Unisys asked IDC to survey staff following the implementation of Unisys University. Employee satisfaction had risen from 23 to 76%. New hires from employee referrals had risen from 10 to 22%, graduate hires had risen from 4 to 14% and attrition had dropped by 10%. IDC found that every employee interviewed mentioned Unisys University as a major improvement and competitive advantage for employees and the company.

### DISTILLED WISDOM 5 – Job description of a great e-learning champion

#### Current Experience

- Good existing network
- Early adopters
- Integral part of a community of interest
- They will be peers of group, not managers (who are too busy)
- Respected in their sphere of influence
- Visible player at team meetings

#### Required Competencies

- Knowledgeable about the technology
- Able to coach and facilitate
- Proven communication skills
  - not afraid to challenge the programme and raise feedback on what will and won't work
  - ability to take information packs provided and top and tail the information to make it come alive and relevant at team meetings
- Good influencers
- Able to troubleshoot

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### The role of e-learning champions

71% of the sponsors identified and trained local champions to act as change agents for e-learning. Champions were mainly used by organisations who were implementing specific initiatives e.g. change over to new LMS which changed delivery and booking of learning, introduction of specific compliance programmes, rollouts of new technology etc. They were not used in rollout of micro processes

Two types of business champions were identified in significantly contributing to success -- those at senior level and those at the user level. Local champions were seen as essential, particularly for the successful implementation of centrally produced content.

Those using champions reported that usage massively increased and resistances decreased.

The following distilled wisdom

table outlines some of the characteristics of great e-learning champions as outlined by the sponsors:

### Managing change from within

Does technology pose a threat to training professionals within the participating organisations? This study has found that technology is changing the way that traditional training departments work with the business and are perceived within the organisation. Generally the technology is streamlining administration and increasing the volumes of learning that is delivered. Organisations are consolidating disparate training functions under

new learning and development brands such as BT Academy and Learn BA. There is an increasing trend to have closer alignment with business activities and business goals and e-learning is one of the approaches used by these organisations to achieve this objective.

### DISTILLED WISDOM 5 – Job description of a great e-learning champion continued

- Able to encourage
- Informed

#### Attitude

- Vocal
- Evangelists
- Share a passion and vision for learning
- Able to get excited about change
- Converted sceptic/cynics make the best champions
- Affinity with people

### E-learning in action at BUPA – the changing face of training

BUPA currently has a leading market share in private medical insurance and has established high standards. However its position as a market leader will only continue if the business builds its ability to rapidly respond to the market with new products. Within the UK membership services business unit, the learning and development team have also looked for new ways to streamline their services to the business, implementing a LMS to provide administration efficiencies and to co-ordinate all learning functions so that now staff can book classroom courses online, access learning resources such as toolkits, books, online services from Ashridge Management and generic content which has been tailored to specific job functions.

In addition, it leveraged the technology to support the rollout of a new personal medical insurance product called Heartbeat, developing a blended learning solution for sales and support staff that included audio elements (for those constantly travelling), e-learning, workshops tailored to job functions and online testing. This new approach to learning has been acknowledged within the company at the highest levels with the managing director stating that this was the 'best learning initiative in BUPA' and encouraging all of the board members to take part in the programme.

Changing the way that the business perceives and receives learning however is a result of change from within the training team itself. The new LMS has meant that the staff headcount and the reliance on temporary staff have significantly reduced and now all learning is managed by one administrator. The team now has three account consultants to support sales services and support whose role is to work as a business partner to the specific business areas, identifying skill requirements that will enable the business areas to perform. BUPA has dropped the word training from the main titles of the account consultants to endorse the role of business partner and detract from traditional perceptions of training.

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## E-learning in action at BUPA – the changing face of training continued

But the internal change was more than just a name change. The training teams have been building new competencies and approaches to help improve business fit – courses such as consultancy skills and commercial awareness are now delivered to the training professionals as part of their ongoing development.

As a result, business lines within BUPA now works with the account consultants to build flexible action plans with quarterly reviews against business targets and training is now built into major projects, such as Heartbeat, from the start.

A number of the participating sponsors have highlighted a shift in the role of trainer as they provide tutoring and mentoring skills on line. (See the NHS Information Authority case study in chapter 5). Perhaps more significantly is the development of newer roles within the learning and development function specifically acting as a consultant to the business on learning matters. For example, Performance Consultants at Unisys work with the business to identify performance issues and propose solutions which may or may not include traditional training (electronic or otherwise).

The participating organisations recognise that implementing e-learning creates massive change within the traditional training function and many have implemented processes to manage that transition internally in order to embrace the new opportunities.

## Summary of Key Findings

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The role of communication in winning hearts and minds:

- Planned communication strategies to access all stakeholders is essential throughout the e-learning implementation process
- When launching e-learning use multiple communication methods as they each have strengths in addressing different requirements and audiences
- Communication should continue following a launch in order to maintain and fuel interest with communications used to ensure that e-learning is understood within the current context of the business.
- Gather and disseminate personal testimonies to build credibility.
- E-mail should be used in a targeted fashion to personalise messages and offer direct links to content or services
- Whatever communications you do, you have probably underestimated by a factor of 10

Final thoughts on change management

- Don't fight the system – recognise and work with existing business culture to help position e-learning rather than seeking to change it.
- Consider the role of branding to build ongoing awareness of significant changes in learning approaches.
- For the successful implementation of centrally initiated projects, identify and work with appropriate local champions.
- Do not neglect to manage change from within – plan for new skills for existing training staff

### FOOTNOTES

1. taken from Kotter 1994, Eccles 1995 and Gleicher, first cited in 1960

# CONCLUSION

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The 15 organisations participating in this study have over 100 years of experience of integrating current technologies into the learning strategy and this study has shown that e-learning has become an accepted and mainstream approach to learning within these businesses. This was evidenced by the 2,000+ users who have shown that they have embraced the technologies as a valid form of learning.

In addition, these organisations have demonstrated models of working with e-learning that ensure that e-learning success is sustained beyond the pain and glory of initial launch and despite frequently changing business climates.

Whilst the context and environment for e-learning has differed markedly from organisation to organisation, this study shows that there are two consistent components to their strategies that have led to sustained e-learning success across the board:

- Business alignment – establishing clear links between learning events and clearly defined business objectives
- Business engagement – the pro-active involvement of influential stakeholders throughout the learning process

These components are underpinned by pragmatic attitudes to technology, with e-learning tools and techniques providing a supporting rather than a driving role in successful implementations.

## **Business alignment**

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Strong alignment to business drivers on both an organisational scale and on a project by project basis provides a context for learning that makes sense to the learners and the business managers. It is critical to ensure the relevance of the learning offering – both in bespoke content design and also in the positioning of generic content within the organisation. Ongoing business alignment also provides core stability to the learning strategy – allowing it to flex with the changing business environment.

Whilst aligning business with learning objectives is common sense it cannot be relied upon as a given, this study has show that the participants pro-actively pursue a number of specific strategies to ensure that their e-learning provision continues to meet specific business driven needs:



### Building credibility with the business

This comes with the investment of time – attendance at business briefings , one to one meetings with project leaders and the physical proximity that comes from positioning the learning function as part of the business function. All these activities develop understanding of business pressures and needs and help to build the reputation of the learning function as a useful business partner with meaningful solutions.

### Redefining the role of the learning professional

New competencies are being built into the skills portfolio of training professionals to enable them to increase understanding of business needs and apply learning solutions to business issues more effectively. New job functions such as internal account manager and performance consultant are increasingly introduced to provide an effective interface with internal customers

### Outsourcing and managed service

Using tools and services to free internal resources from administration and technical issues allows training professionals to focus on and develop closer business relationships

### The business case

The business case is used to provide common terms of reference between the training function and business partner. Clearly defined business measurements demonstrate a logical link between the learning initiative and business objective. The business case puts cost savings in context of the wider issues.

### Alignment with business culture

Successful alignment of learning and business takes into consideration and uses the existing business culture to effect a change in learning behaviours.

The organisations in this study not only use the above strategies to ensure that their learning is developed and delivered to meet specific business requirements but they are also pro-active in using those business needs to drive learning forward in their organisations.

## Business engagement

This study highlighted the influence of different stakeholders in the business and their impact on e-learning success:

Table 8.1

STAKEHOLDER	IMPACT AND ROLE
Senior Management	Build Vision, Create Priority, Define Success
Business Sponsors	Own Business Issues, Incorporate Learning as part of solution, Influence Management and Define Success
Line Managers	Influence and Motivate individuals, Allocate time, Support
Learners	Participate in Training, Apply knowledge, Improve performance
E-learning Champions	Motivate, Engage, Support, Ensure local relevance

Successful and sustainable e-learning strategies involve the pro-active engagement of all influential stakeholders throughout the learning process. The engagement process involves capturing attention, building commitment and ensuring action.

A number of strategies for business engagement were highlighted in this study

### **Defining success measurements**

The process of involving business management in jointly defining measurement and return on investment criteria during planning encourages ownership and support of the project. It clearly sets out what is needed to meet business expectations at the outset.

### **Grabbing attention**

100% of sponsors believed it was essential to deliver quick wins early in the implementation and many used the pilot phase during planning to not only provide proof of concept but also to gather success stories that were used to grab attention during a wider rollout.

### **Continually Sharing Success**

Management and learner engagement can be maintained when learning results are kept visible internally through the use of league tables to encourage competition, personal peer testimonies and through communicating external recognition of success such as award wins or press coverage.

### **Support**

Not only is provision of learning support a driving factor in engaging learners in the process but this study has shown an increase in tools and processes supporting the managers and local champions as they support the learners.

### **Structure and recognition**

Learners do not necessarily distinguish between formal and informal e-learning and still have a strong tendency towards traditionally recognised learning structures within the new medium. Their desire for recognition of achievements also indicates the need for formalised learning structures within e-learning to encourage learner commitment to the programmes.

### **Communication**

An ongoing two way communication strategy is imperative for e-learning success. Communications must be relevant to each stakeholder, draw heavily on internal testimony and recommendation and should use multiple routes to both disseminate and gather information.

### **In summary**

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E-learning success in the organisations within this study has been sustained primarily because of the sponsors' strategies to adapt and change in response to the business climate.

The primary investment is one of time and effort in building relationships and bridges with the business community in order to develop credibility and reputation as a business partner. As a result, this credibility is increasing within the organisations but only in pockets, training still only hits the business consciousness in times of crisis.

E-learning has made more resources and time available to the participating organisations to identify and address business needs, providing new opportunities to for creative business solutions.

# APPENDIX 1

## Overview of participants

NAME	INDUSTRY	NUMBER OF EMPLOYEES	HOW LONG	SUBJECTS TAUGHT WITH E-LEARNING	E-LEARNING METHODS AND TOOLS
B&Q	Retail	30,000 across multiple UK sites	3-5 years	Company specific processes or technical knowledge, Health & safety, Industry compliance issues, IT, Leadership/management	Bespoke content, online assessment and generic content managed via an enterprise wide LMS
BA	Transport	48,000 staff worldwide	3-5 years	Company specific processes or technical knowledge, Health & safety, Industry compliance issues, IT, Interpersonal skills, Leadership/management	Bespoke content, generic content with a simple LMS system
BOC	Manufacturing	5,000 worldwide	3 – 5 years	Commercial skills, Company specific processes or technical knowledge, Health & safety, Sales & marketing	Generic and bespoke content with simple tracking systems
BT	Telecoms	100,000 across multiple UK sites	Over 5 years	Call centre knowledge and processes, Company specific processes or technical knowledge, Customer care, Health & safety, Industry compliance issues, IT, Interpersonal skills, Leadership/management, Sales & marketing	Bespoke content, Chat rooms, Discussion forums, Enterprise wide LMS, E-mail, E-tutoring, Generic content, Virtual classroom/conferencing
BUPA	Health	2,500 across multiple UK Sites	3 – 5 years	Company specific processes or technical, knowledge, Customer care, Interpersonal skills, Leadership/management, Sales & marketing	Bespoke content, Discussion forums, E-mail, Enterprise wide, Generic content, LMS Virtual classroom/conferencing
C&W	Telecoms	18,000 worldwide	Over 5 years	Call centre knowledge and processes, Technical skills, Customer care, Health & safety, IT, Interpersonal skills, Leadership/Management, Sales & marketing,	Bespoke content, E-mail, Enterprise wide LMS, Generic content, Virtual classroom/conferencing

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NAME	INDUSTRY	NUMBER OF EMPLOYEES	HOW LONG	SUBJECTS TAUGHT WITH E-LEARNING	E-LEARNING METHODS AND TOOLS
Credit Suisse First Boston	Financial Services	Approximately 19,000 staff worldwide	Over 5 years	Company specific processes or technical knowledge, Customer care, Health & safety, Industry compliance issues, IT, Interpersonal skills, Leadership/management, Sales & marketing	Bespoke content, E-mail, Enterprise wide LMS Virtual classroom/conferencing, Facilitated discussion rooms, Generic content
Cisco	IT	2,500 across multiple European sites	Over 5 years	Call centre knowledge and processes, Company specific processes or technical knowledge, Customer care, Industry compliance issues, IT, Interpersonal skills, Leadership/management, Network System Engineering and Product Training, Sales & marketing	Discussion forums, E-mail, Enterprise wide LMS, Facilitated discussion rooms, Generic content, Online mentoring, Video on Demand, Virtual classroom/conferencing. Web based training
Manchester NHS Agency	Government	18,500 multiple sites in the UK	Over 5 years	IT	Bespoke content, E-mail, Generic content
Marsh Ltd	Insurance	37,000 worldwide audience	Over 5 years	Call centre knowledge and processes, Company specific processes or technical knowledge, Customer care, Health & safety, Industry compliance issues, IT, Interpersonal skills, Leadership/management, Sales & marketing	Bespoke content, E-mail, Enterprise wide LMS, Generic content, Virtual classroom/conferencing
NHS Information Authority	Government	450,000 in multiple sites across the UK	Over 5 years	Call centre knowledge and processes, Company specific processes or technical knowledge, Customer care, Health & safety, Industry compliance issues, IT, Interpersonal skills, Leadership/management	Bespoke content, Chat rooms, Discussion forums, via a simple LMS system, E-mail, E-tutoring, Facilitated discussion rooms, Generic content, Online mentoring, Virtual classroom/conferencing.
PricewaterhouseCoopers	Professional Services	120,000 worldwide	Over 5 years	Accountancy skills and business skills, Company specific processes or technical knowledge, Industry compliance issues, IT, Interpersonal skills, Sales & marketing	Bespoke content, Chat rooms, Discussion forums, Enterprise wide LMS, E-mail, E-tutoring, Generic content, Online mentoring, Virtual classroom/conferencing,

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NAME	INDUSTRY	NUMBER OF EMPLOYEES	HOW LONG	SUBJECTS TAUGHT WITH E-LEARNING	E-LEARNING METHODS AND TOOLS
Royal Bank of Scotland	Financial Services	126,000 worldwide	Over 5 years	Call centre knowledge and processes, Company specific processes or technical knowledge, Customer care, Health & safety, Industry compliance issues, IT, Interpersonal skills, Leadership/management	Bespoke content, E-mail, Generic content, Simple LMS, Virtual classroom/conferencing
Unipart	Manufacturing	10,000 worldwide	Over 5 years	Call centre knowledge and processes, Company specific processes or technical knowledge, Customer care, Health & safety, Industry compliance issues, IT, Interpersonal skills, Leadership/management, Sales & marketing	Bespoke content, Discussion forums, E-mail, Generic content, Simple LMS, Virtual classroom/conferencing
Unisys	IT/Consulting	40,000 worldwide	Over 5 years	Company specific processes or technical knowledge, Customer care, Health & safety, Industry compliance issues, IT, Interpersonal skills, Leadership/Management, Sales & marketing	Bespoke content, Chat rooms, Discussion forums, E-mail, Enterprise wide LMS, E-tutoring, Facilitated discussion rooms, Generic content, Online mentoring, Virtual classroom/conferencing,

# APPENDIX 2

## Research Instruments

### Online survey Questionnaires

#### E-learning sponsor survey

The following is a transcript of the online survey for the e-learning sponsors

Welcome

Thank you for agreeing to take part in a European research programme which is looking at organisations that have an established e-learning initiative.

Your views and opinions as an experienced e-learning implementer are invaluable and your input to this programme will be from two sources:

1. This online survey, which should take no more than 10 minutes to complete and is totally confidential.
2. A face to face or telephone interview where you will have additional opportunity to expand on your survey answers and give examples.

#### DEFINITION OF E-LEARNING

For the sake of clarity, the general term 'e-learning' used in this research represents the following:

- Any electronic form of delivering learning content ( e.g. online courses, CD courses, virtual classroom, online mentoring etc)
- It also includes programmes where e-learning content is part of an overall training package, mixed with face to face and/or on the job training.

The online survey is divided into 6 sections, each with no more than 10 short questions that just require a click to complete. With the exception of the first question, there are no boxes to fill in.

To complete the survey, just click on the responses that you feel most comfortable with. On completion of each question, click to confirm your answer and then click next - you will be automatically taken to the next question.

If you have any questions regarding this survey, please email [laura@lauraoverton.com](mailto:laura@lauraoverton.com)

Many thanks for your time and feedback.  
Laura Overton, Principal Researcher, LO Associates

## SECTION 1 - DEMOGRAPHICS

1. What is your audience size for e-learning? Fill in
2. Where is your audience located?
- One central location
  - Multiple sites in the UK
  - Across Europe
  - Worldwide
3. How long has your organisation used technology based training (e.g. CD, CBT )
- Less than 1 year
  - 1 – 2 years
  - 3 – 5 years
  - Over 5 years
4. How long has your organisation used web based learning (e.g. intranet, internet)
- Less than 1 year
  - 1 – 2 years
  - 3 – 5 years
  - Over 5 years
5. Which of the following terms are you familiar with? Click all that apply
- Generic content
  - Bespoke content
  - Virtual classroom/conferencing
  - Online mentoring
  - e-tutoring
  - Chat rooms
  - Discussion forums
  - e-mail
  - Facilitated discussion rooms
6. Which e-learning formats do you currently use? Click all that apply
- Generic content
  - Bespoke content
  - Virtual classroom/conferencing
  - Online mentoring
  - e-tutoring
  - Chat rooms
  - Discussion forums
  - e-mail
  - Facilitated discussion rooms
7. Which e-learning formats do you plan to use? Click all that apply
- Generic content
  - Bespoke content
  - Virtual classroom/conferencing
  - Online mentoring
  - e-tutoring
  - Chat rooms
  - Discussion forums
  - e-mail
  - Facilitated discussion rooms

8. Have you introduced a learning management system (LMS)? Click one that applies

- We have an enterprise wide LMS
- We use a simple LMS
- We have basic tracking
- We do not use an LMS or provide tracking

9. Do you use e-learning tools for in house development? Click one that applies

- Yes
- No but we are planning this in the future
- No and we have no plans to do so in the future

10. Where do you offer learning? Click all that apply

- At the desk
- At home
- In a learning centre
- In a quiet spot away from the desk
- When travelling

## SECTION 2

1) What measurements do you currently use to measure e-learning success? Click all that apply

- Cost saving
- Course completion
- User satisfaction
- Staff retention
- The satisfaction of your organisation's customers
- Timely project completion
- Impact on existing job performance metrics ( e.g. machinery down time)
- Application of knowledge to the job
- Financial impact on the organisation

Please indicate your agreement with the following statements:

	Strongly Disagree	Disagree	Agree	Strongly Agree
2) The e-learning strategy visibly fulfils a core business strategy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3) The success of our e-learning initiatives is recognised at board level in my organisation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4) External recognition of our e-learning achievements (such as seminar presentations, awards) increases the internal recognition of those achievements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5) e-learning course completions are a valid indicator of e-learning success	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6) I regularly report quantifiable measurements to management to demonstrate e-learning success	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7) It is important to deliver quick wins early in the e-learning implementation process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8) Overall, e-learning is perceived to be a success within the business units in my organisation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



### SECTION 3

1. In our organisation, e-learning is linked to the following systems/processes; Click all that apply

- Appraisal
- Succession planning
- Bonus schemes
- Recruitment & Retention
- Management Goals
- Personal Goals
- Competencies
- Resource planning
- It is not linked to any other process

Please indicate your agreement with the following statements:

	Strongly Disagree	Disagree	Agree	Strongly Agree
2. It is important that e-learning is used to build skills critical to the learner's current job	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. It is important that e-learning is used to provide additional opportunities for career development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Understanding and developing learner motivation is a high priority in the implementation of e-learning solutions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. I regularly meet with Department Heads to ensure relevance of our e-learning offering	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. The visible demonstration of e-learning success within the business has helped us maintain resources allocated to learning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Overall, my organisation agrees that e-learning makes a relevant contribution to business success	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### SECTION 4

1. Please tick the top 3 stakeholders that have the most influence on e-learning success in your organisation?

- Board Executive
- Line managers
- Head of IT
- Head of Finance
- Head of HR
- Training department
- Local e-learning champions
- Learners
- Project sponsor in the business

Please indicate your agreement with the following statements:

	Strongly Disagree	Disagree	Agree	Strongly Agree
2. Senior Management regularly demonstrate commitment to e-learning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- |   |                          |                          |                          |                          |
|---|--------------------------|--------------------------|--------------------------|--------------------------|
| 3. We use existing business drivers to help establish the urgency for e-learning  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. We identify and train local champions to act as change agents for e-learning   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. My company celebrates the e-learning successes of individuals  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. When implementing a new e-learning strategy it is important to initially demonstrate success through a specific pilot project before embarking on a company wide rollout | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. It is critical to plan and act in short intervals, delivering successes and analysing results as you go  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. Overall, if e-learning is to succeed within an organisation, it is critical to have a change management programme embedded within the e-learning strategy                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

#### SECTION 5

1. Which type of subjects has your organisation delivered using a mix of e-learning methods alone? Click all that apply
- Leadership/Management
  - Interpersonal skills
  - IT
  - Sales & Marketing
  - customer care
  - Industry compliance issues
  - Company specific processes or technical knowledge
  - Health & safety
  - Call centre knowledge and processes
2. Which type of subjects has your organisation delivered using a mix of classroom and e-learning methods? click all that apply
- Leadership/Management
  - Interpersonal skills
  - IT
  - Sales & Marketing
  - Customer care
  - Industry compliance issues
  - Company specific processes or technical knowledge
  - Health & safety
  - Call centre knowledge and processes
3. What support do you offer e-learners? click all that apply
- Telephone help desk
  - e-mail
  - Learning centre support
  - Line Manager support
  - Access to Online Tutors
  - Electronic performance support

- Web resources
- Mentoring
- Reference materials
- Follow up with face to face support

4. In your opinion, what is the most popular support system with your learners – click one

- Telephone help desk
- e-mail
- Learning centre support
- Line Manager support
- Access to Online Tutors
- Electronic performance support
- Web resources
- Mentoring
- Reference materials
- Follow up with face to face support

Please indicate your agreement with the following statements:

	Strongly Disagree	Disagree	Agree	Strongly Agree
5. It is important to offer learners a choice of learning delivery options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. It is important to offer learners a choice of locations for e-learning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. It is critical to provide effective training on the e-learning system for every learner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Overall, providing learner support is a critical element to e-learning success within our organisation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## SECTION 6

1. What communications methods do you use to launch a new e-learning initiative? Click all that apply

- Support video by an executive
- Posters
- e-mail
- Company newsletter
- Open days
- giveaways
- Peer testimonies
- None

2. At the launch, what single communications method provides the maximum impact on learner participation? Click ONE

- Support video by an executive
- Posters
- e-mail
- Company newsletter
- Open days
- Peer testimonies
- giveaways

3. Following the launch what communications methods do you use to maintain interest? Click all that apply

- Support video by an executive
- Posters
- e-mail
- Company newsletter
- Open days
- Peer testimonies
- giveaways
- None

4. What single communications method is the most effective at maintaining interest? Click ONE

- Support video by an executive
- Posters
- e-mail
- Company newsletter
- Open days
- Peer testimonies
- giveaways

5. We use the following methods to obtain feedback from the learner community. Click all that apply

- Focus groups
- Regular user satisfaction surveys
- Attending team meetings
- Feedback sheets following each course
- We do not gather learner feedback

Please indicate your agreement with the following statements:

	Strongly Disagree	Disagree	Agree	Strongly Agree
5. It is important to offer learners a choice of learning delivery options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. It is important to provide your e-learning initiative with a specific identity and brand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. It is important to communicate quick wins early in the e-learning implementation process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Information provided about e-learning options must be easy to use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Overall, we regularly communicate e-learning successes to the business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## EPILOGUE

Thank you for taking the time to complete this survey.

There will be additional opportunity to expand on your answers in the follow up interview.

## E-Learning User survey

The following is a transcript of the online user survey:

### PROLOGUE:

Organisation X has been selected to take part in a European research programme which is looking at organisations that have an established e-learning initiative. Your views as an e-learning user are an important part of this study so thank you for agreeing to participate.

The following survey should take no more than 10 minutes to complete and is totally confidential. Please finish the survey in one go.

### Definition of e-learning

For the sake of clarity, the general term 'e-learning' used in this research represents the following:

- Any electronic form of delivering learning content ( e.g. online courses, CD courses, virtual classroom, online access to specialists etc)
- It also includes programmes where e-learning content is part of an overall training package, mixed with face to face and/or on-the-job training.

The survey is divided into 6 sections, each with no more than 8 short questions that just require a click to complete. There are no boxes to fill in.

To complete the survey, just click on the responses that you feel most comfortable with. On completion of each question, click to confirm your answer and then click next - you will be automatically taken to the next question.

If you have any questions regarding this survey, please email [laura@lauraoverton.com](mailto:laura@lauraoverton.com)

Many thanks for your time and feedback.

Laura Overton  
Principal Researcher  
LO Associates

### SECTION1 -

1. I am

- Male       Female

2. I am age

- Under 25       26 - 39       40 - 54       55 and over

3. Do you have management /team leadership responsibilities for staff

- Yes       No

4. Do you regularly use a computer as a standard business tool in your job?

- Yes       No

5. Where do you spend most of your working day?

- office
- Working from home
- On site at customer
- On the road

6. Most of my e-learning is done at:

- my desk
- home
- In a learning centre
- A quiet spot away from my desk
- When travelling

7. Most of my e-learning is done

- During working hours
- Outside of working hours

8. Which subjects have you used e-learning for Click all that apply

- Leadership/Management
- Interpersonal skills
- IT
- Sales & Marketing
- customer care
- Company specific processes or technical knowledge
- Health & safety
- Call centre knowledge and processes

SECTION 2

	Strongly Disagree	Disagree	Agree	Strongly Agree
1. E-learning is more flexible to my workload than classroom	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Once I have learnt what I need from my e-learning, I do not need to complete the course	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. It is important to me that I complete an e-Learning course from start to finish	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. It is important to me to have e-learning as a choice in my learning options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Following e-learning I am able to use the learning points in the workplace	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Following a classroom course I am able to use the learning points in the workplace	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. e-learning is valuable to me because it gives me additional opportunities to further develop my career	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Overall, the introduction of e-learning is a valuable addition to my training options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SECTION 3

Strongly    Disagree    Agree    Strongly

	Disagree		Agree	
1. My company provides e-learning events that are directly relevant to my current job	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. It is important to me that my e-learning achievements are recognised within my organisation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. E-learning provides me with more control and visibility of my own development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. E-learning seldom provides me with the knowledge I require	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. E-learning usually provides me with the knowledge I require	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Classroom courses provide me with more personal control over my development than e-learning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. E-learning has increased my opportunity to build new skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Overall, I would recommend e-learning to a co-worker as part of an ongoing skills development plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>SECTION 4</b>				
	Strongly Disagree	Disagree	Agree	Strongly Agree
1. I understand why my organisation introduced e-Learning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. E-learning is easy to access	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. E-learning is simple to use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. I only take e-learning courses when they are compulsory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. My company acknowledges my e-learning successes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Senior Management are visibly supportive of e-learning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Do you plan to use e-learning again	<input type="checkbox"/> Yes	<input type="checkbox"/> No		
8. Overall I support the introduction of e-learning in my organisation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>SECTION 5</b>				
	Strongly Disagree	Disagree	Agree	Strongly Agree
1. My Training Department supports me as an e-learner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. My Manager supports and encourages my use of e-learning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- |  |                          |                          |                          |                          |
|--|--------------------------|--------------------------|--------------------------|--------------------------|
| 3. I am provided with enough time to learn at work                               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. I am able to learn at a location that suits me                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. During an e-learning programme, it is not easy to find support when I need it | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. The e-learning support provided meets my needs                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. I was trained effectively on how to use e-learning                            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. Overall, I feel supported during my e-learning experience                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

SECTION 6

1. I first heard about e-learning from : Click ONE of the following

- My manager
- A colleague
- A video from a senior executive
- Posters
- e-mail
- Company newsletter
- Open days

2. I booked my first e-learning event because of: Click ONE of the following

- My manager
- A colleague
- A video from a senior executive
- Posters
- e-mail
- Company newsletter
- Open days

3. The one person whose opinion will most likely encourage me to take an e-learning programme is: Click ONE of the following

- A senior executive
- My manager
- A member of the training department
- My learning centre co-ordinator
- A work colleague
- A friend

Strongly Disagree    Disagree    Agree    Strongly Agree

- |   |                          |                          |                          |                          |
|---|--------------------------|--------------------------|--------------------------|--------------------------|
| 4. My company could do more about keeping me informed about new e-learning events | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. The information I receive about e-learning programmes is relevant to me        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. I know how to quickly find the e-learning programmes that will improve         |                          |                          |                          |                          |



- |  |                          |                          |                          |                          |
|--|--------------------------|--------------------------|--------------------------|--------------------------|
| my skills  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. My training department regularly ask for feedback about e-learning    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. Overall, the communication I receive about e-learning is useful to me | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

#### EPILOGUE

Thank you for taking the time to complete this survey.

If you have any questions, please do not hesitate to contact the researchers at the following e-mail address  
[Laura@lauraoverton.com](mailto:Laura@lauraoverton.com)

### Interview schedules

The following questions were used in the follow up interviews with sponsors and users:

CORE QUESTIONS	CLARIFYING QUESTIONS
<p>Section 1</p> <p>What part of the organisation do you sit in?</p> <p>Please describe key steps in the history of e-learning implementation in your organisation</p> <p>How do you track learning progress?</p> <p>Why did your organisation consider e-learning?</p> <p>How would you describe the demographics of your audience?</p> <p>How would you describe the culture of your business?</p>	<p>Is that important to the success of e-learning in your business?</p> <p>Why is this important to you?</p> <p>What factors were important in your decision to implement e-learning?</p>
<p>Section 2</p> <p>Why is your e-learning successful &amp; how do you know?</p> <p>Can you provide any practical examples of how you have demonstrated business value linked to learning?</p> <p>What core business strategies does your e-learning support?</p>	<p>How does your business define e-learning success?</p> <p>What methods grab executive attention for e-learning internally? (e.g. benchmarking, awards, what metrics?)</p>
<p>Section 3</p> <p>What are the current business drivers for your organisation?</p> <p>How do you ensure that your e-learning is able to adapt to changing business requirements?</p> <p>What motivates your learners?</p>	<p>How do you ensure that learning continues to support those business drivers? Who do you work with, what is the process?</p> <p>What actions have been taken to understand learner motivation?</p>
<p>Section 4</p> <p>What were the major obstacles that you had to address at the launch of e-learning within your business?</p> <p>What processes were implemented to win the hearts and minds of the stakeholders?</p> <p>Was a pilot important to your success?</p> <p>How important was a business case for e-learning?</p>	<p>How did you address them?</p> <p>Did the obstacles and resistances change as the implementation progressed? In what way?</p> <p>With hindsight was this important? If no, why not? If Yes, what were you able to achieve?</p> <p>What was in it, how was it presented?</p>

<p>Can you give examples of quick wins that helped you win hearts and minds?</p> <p>Did you identify and work with local champions?</p> <p>What are the most important lessons learned in managing change?</p>	<p>What role did they have, how were they selected, what are the qualities of a good champion?</p>
<p>Section 5</p> <p>How is your e-learning integrated into the total learning process, how important is this?</p> <p>How important is choice in the success of your e-learning programme?</p> <p>How has the provision of support to the learners affected their motivation and willingness to participate in e-learning?</p> <p>What factors contribute to successful blended learning in your organisation?</p>	<p>In what ways do you provide choice to the business and to learners?</p>
<p>Section 6</p> <p>What audiences are most receptive to e-learning/ what audiences are least receptive?</p> <p>How did you motivate learners to participate?</p> <p>How do you obtain feedback from stakeholders?</p> <p>What types of communication have had the most impact on the management teams?</p> <p>If you had quick wins in your organisation, how did you communicate them?</p> <p>What was your launch strategy and ongoing process?</p>	<p>What do you consider the influencing factors on audience receptiveness?</p> <p>Describe the communication strategy that has had the most impact on learner participation.</p> <p>What do you do with the feedback?</p> <p>What would you do differently?</p>