



Pre-meeting survey :
Future of Enterprise eLearning

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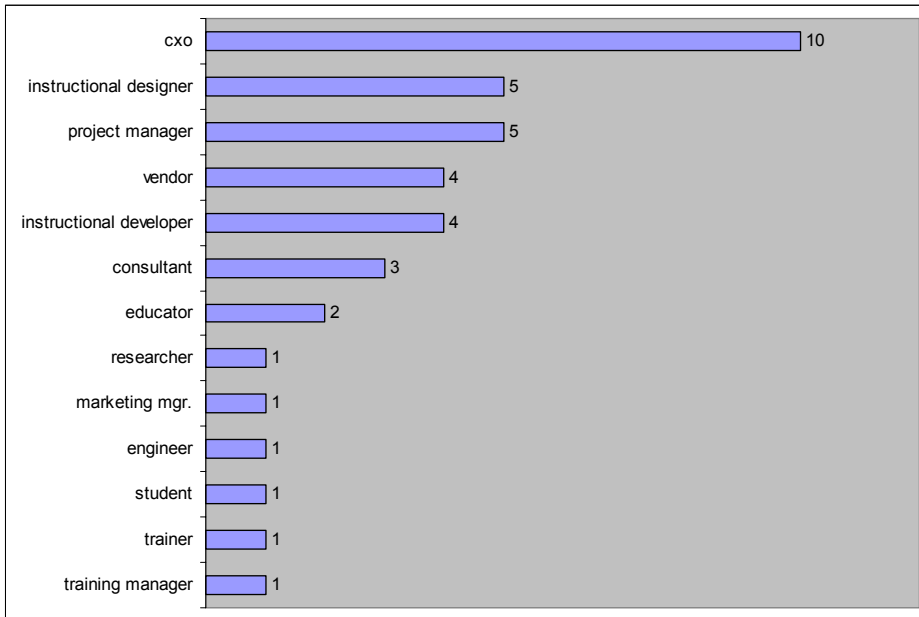
June 11, 2003

Survey background

- Web-based survey on e-LF site
- 1 week, 25 responses (slightly low)
 - 10 remote attendees
 - 11 in-person regulars
 - 3 attend either
 - 1 non-attendee

Question: “How do you typically attend the e-Learning Forum meetings?”

Roles



Corporate demographics

- Industry**
- 13 e-learning
 - 2 each: education, manufacturing, non-profit, prof. Services
 - 1 each: IT, marketing, software, utility

Employees

1 - 49	13
50 - 99	2
100 - 499	2
500 - 999	0
1000 - 4999	4
5000 - 9999	1
10K+	2

Which of the following best describes your organization's primary focus?

How many employees are at your location?

1-49 employees

50-99 employees

100-499 employees

500-999 employees

1,000-4,999 employees

5,000-9,999 employees

10,000 or more employees

E-Learning usage

How employed

Tactically	9
To customer/vendor	9
To employees	8
Using "advanced" tools (e.g. LCMS)	13
Just exploring	7
Don't know	1

Which of the following describe how eLearning is being used in your location? (check all that apply)

In early phases of exploring/considering eLearning technologies

Using eLearning "tactically" to meet certain training needs

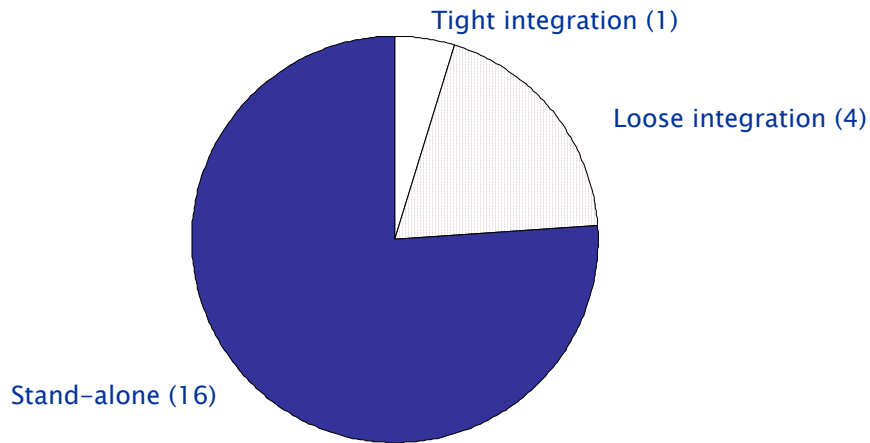
Using eLearning enterprise-wide to support workforce development

Using eLearning to support supplier and customer-focused learning

Using advanced eLearning technologies, including learning object-based systems (e.g. LCMS)

Don't know

Integration strategies



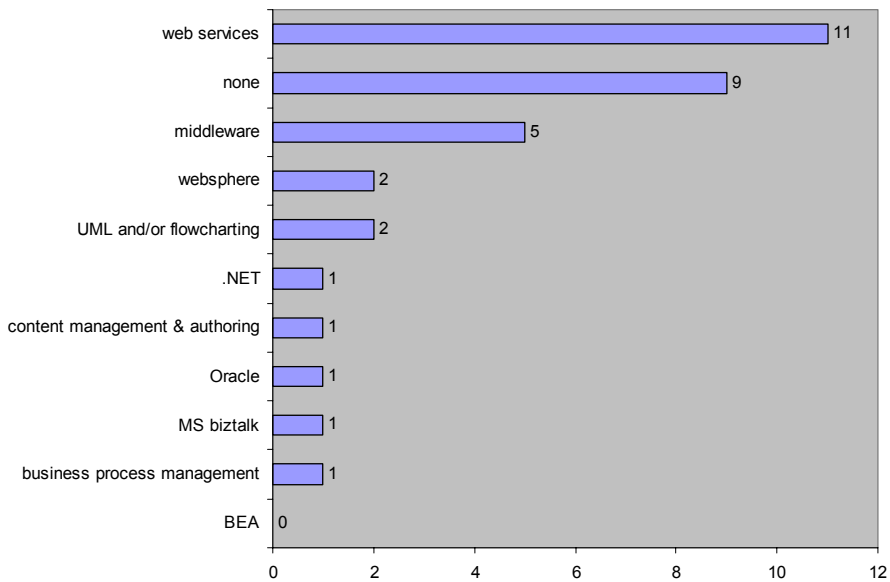
What types of Enterprise Application Integration (EAI) strategies do you use with your Learning technologies?

- Learning technology **tightly integrated** into one or more of company's ERP, CRM, CM, KM or SCM systems (1)
- Learning technology **loosely integrated** into one or more of company's ERP, CRM, CM, KM or SCM systems (4)
- We integrated Learning Technology into a specific enterprise application. (0)
- Learning technologies used as **stand-alone** technologies (16)

What types of Enterprise Application Integration (EAI) strategies do you use with your Learning technologies at your location?

- Learning technology tightly integrated into one or more of company's ERP, CRM, CM, KM or SCM systems
- Learning technology loosely integrated into one or more of company's ERP, CRM, CM, KM or SCM systems
- We integrated Learning Technology into a specific enterprise application. [please specify]
- Learning technologies used as stand-alone technologies

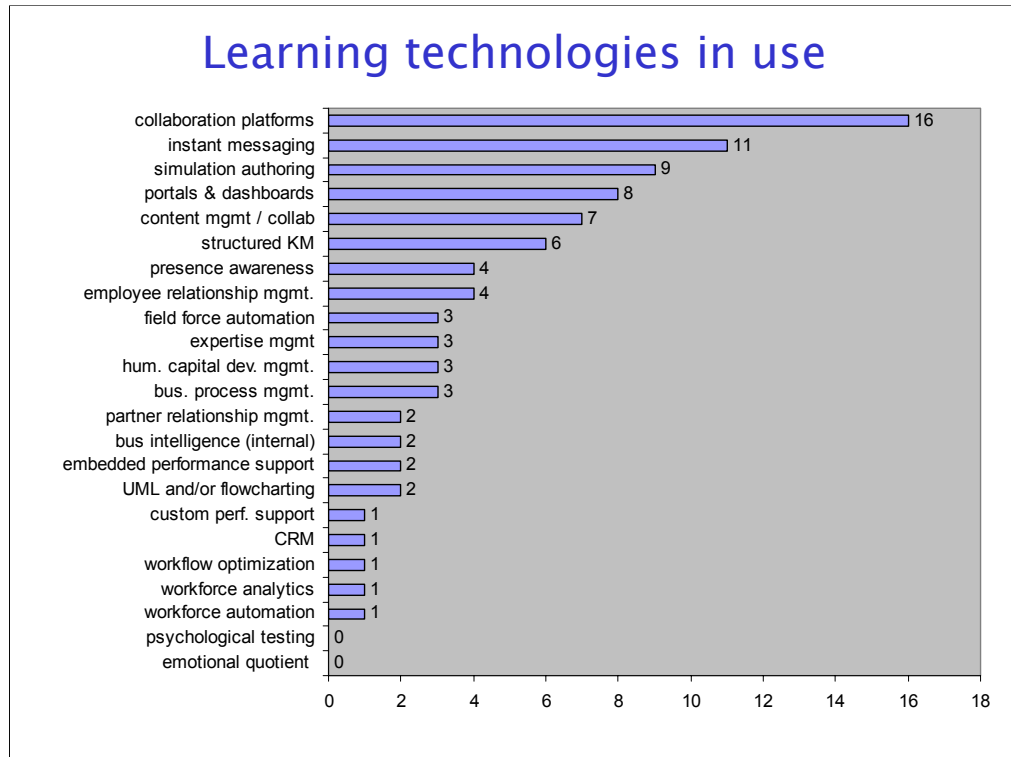
EAI technologies in use



What types of Enterprise Application Integration (EAI) technologies do you use with your Learning technologies at your location?

- UML and Flowcharting tools
- Business Process Management (BPM) platforms
- Web Services
- Middleware
- Microsoft's BizTalk
- IBM's WebSphere
- BEA
- None
- Other *.NET, content management & authoring, Oracle*

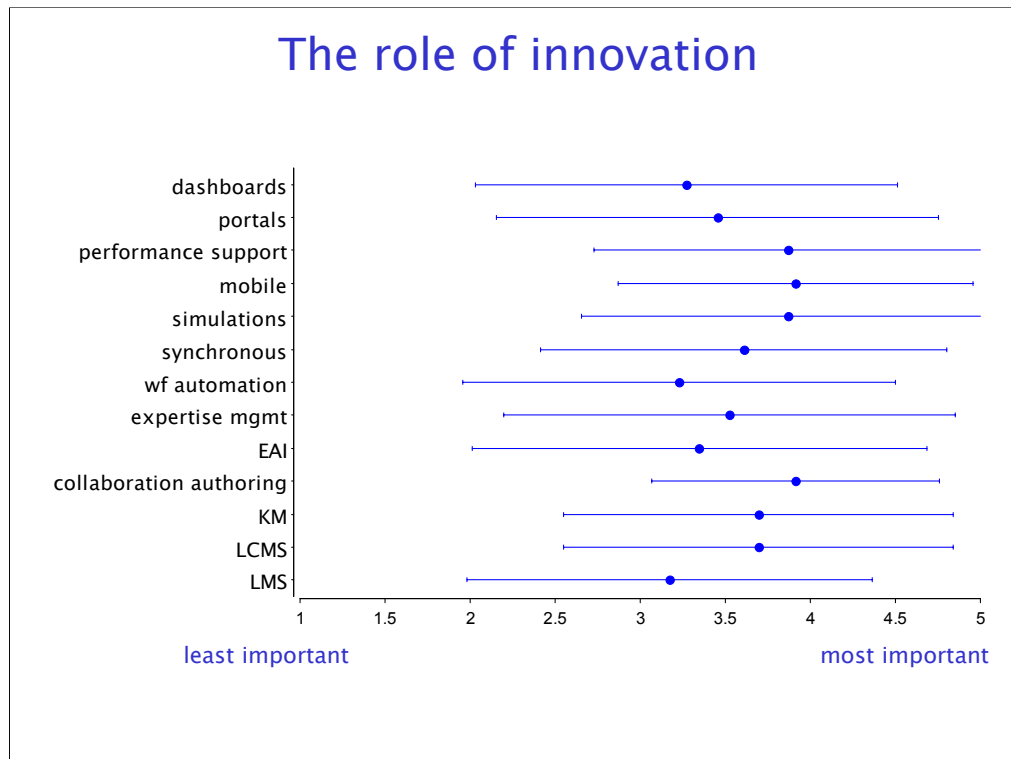
Learning technologies in use



What types of new Enterprise Learning technologies are being used in your location?

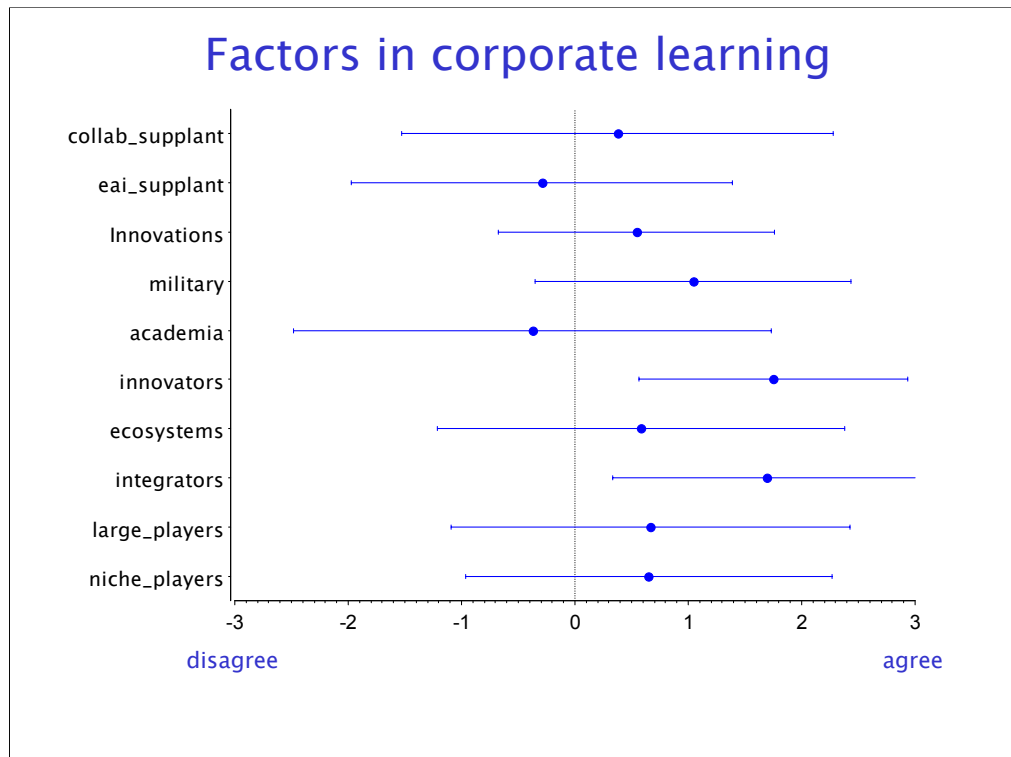
- Simulation content authoring tools
- UML and Flowcharting tools
- Embedded Performance Support (such as Epiance, Knowledge Products, XStream)
- Work Force Automation (WFA) platforms
- Work Force Analytics
- Workflow Optimization systems
- Structured Knowledge Management
- Enterprise Content Management with collaboration features
- Personalized Portals and Executive Dashboards
- Inward-looking Business Intelligence (BI)
- Business Process Management (BPM) platforms
- Employee Relationship Management (ERM)
- Partner Relationship Management (PRM)
- Human Capital Development Management (HCDM)
- Emotional Quotient (EQ) Assessment
- Personality Tests and Assessment prior to Hiring Employees
- Expertise Management and “Expert Finder” Technologies
- Instant Messaging
- Presence Awareness
- Workspace collaboration platforms (such as eRoom, Groove, WebEx, PlaceWare, QuickPlace)
- Mobile Field Force Automation (FFA)
- Other:

The role of innovation



Please indicate how strong innovation will be for the technologies/systems/products below and how enterprise learning, collaboration and workforce management will evolve in the next 24 months: (1-5 scale; 1 = least important, 5 = most important)

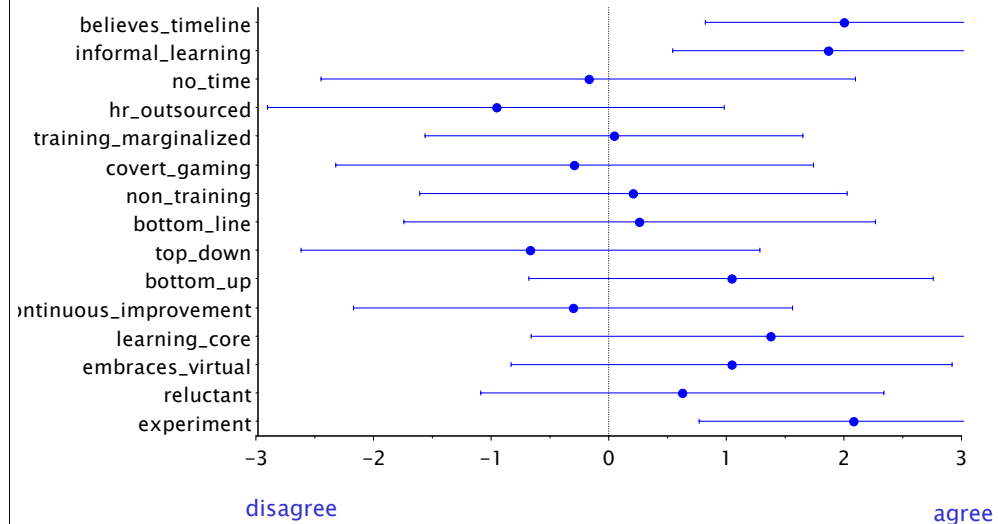
- Learning Management Systems
- Learning Content Management Systems
- Knowledge Management Systems
- Collaboration Authoring Tools
- Enterprise Application Integration (EAI) tools
- Expertise Management
- Workforce Automation and Optimization
- Webcasting/Virtual Classrooms/Synchronous eLearning
- Games and Simulations-Based eLearning
- Mobile eLearning and Performance Support
- Performance Support Embedded directly in applications
- Personalized Portals based on Job-Roles
- Executive Dashboards that Monitor Workforce Metrics



Please indicate how important the issues and factors below will be for the evolution of corporate learning overall in the next 24 months

- Niche and Best-of-Breed eLearning Companies will have a significant presence in the industry (niche_players)
- Large Technology Companies will dominate Learning Technology innovation (large_players)
- Integration Services will be in high demand (integrators)
- Small players will only survive by being part of a small number of "ecosystems" built around large technology companies (ecosystems)
- Small, innovative players will find important niches (e.g. in games, tools, services and simulations-based eLearning) (innovators)
- Universities will provide innovations in learning technology that will trickle into the enterprise (academia)
- Innovations in high-end military simulation and training will trickle into the enterprise (military)
- in interactive and multi-player gaming trickle into the enterprise (innovations)
- Learning technology will be completely assimilated by enterprise applications suites (eai_supplant)
- Learning Technologies will be assimilated by Collaboration Platforms (collab_supplant)

“Issues within my organization”



Please indicate how important the issues and factors below will be for the evolution of enterprise learning in your organization in the next 24 months:

- My company is willing to experiment with new technologies that promise to improve performance (experiment)
- Due to the recession and increased budget scrutiny, my company is reluctant to buy stand-alone learning technology (reluctant)
- My company is embracing virtual workspace concepts and technologies (embraces_virtual)
- My company defines learning as a core business process (learning_core)
- My company uses an continuous process improvement method such as Six Sigma, Balance Scorecard, ISO, or TQM (continuous_improvement)
- The corporate culture in my company supports “bottom-up” workforce improvement initiatives which allow line workers to fix processes and improve performance of people and systems (bottom_up)
- All learning initiatives are “top-down” projects coming from business unit managers or C-level managers (top_down)
- The “bottom-line” is the only thing that matters in my company right now. (bottom_line)
- Learning technology procurement is now done almost entirely with input or approval coming from outside the training department (non_training)
- My company will not tolerate the idea of gaming and we have to call it something else if we use role-play or business simulation (covert_gaming)
- Training departments in my company are being marginalized by other departments that create tangible ROI (training_marginalized)
- HR in my company is outsourced (hr_outsourced)
- The work pace in my company is picking up and there is no time for learning anymore (no_time)
- Most of the learning that really takes place in my company is informal and occurs between workers sharing information (informal_learning)
- I am optimistic that very innovative learning technologies will become available over the next 24 months (believes_timeline)