

# THE **e**LEARNING DEVELOPERS' JOURNAL

Strategies and Techniques for Designers,  
Developers, and Managers of eLearning

JOURNAL™

## THIS WEEK — MANAGEMENT STRATEGIES

### E-Learning: You Build It — Now Promote It

BY JAY CROSS

Last year I talked with 60 companies about implementing e-Learning. These companies included vendors watching their market share circling the drain, and companies disappointed that less than one person in five was getting involved. Since I was writing a book on implementing e-Learning, I asked lots of questions before pessimistically concluding that most e-Learning initiatives fail to meet expectations.

The bad news is that e-Learning is broken. The good news is that there's a way to fix it. I'll suggest that the road to recovery is marketing e-Learning internally as if e-Learning were a consumer product.

#### What's the problem?

In company after company, I came upon well-developed, on-target, exciting e-Learning initiatives that lacked only one thing: learners. A very large bank licensed a multi-million dollar library of e-Learning programs; a year later, not a single individual had completed a course! A multinational built a two-year masters-level curriculum tailored to the needs of its managers; by the time it was scrapped only two man-

agers had taken the program. A chemical firm commissioned a \$200,000+ custom course of study to improve its financial operations; management dropped the program for political reasons. Companies that have purchased all-employee library cards for more than a thousand web-delivered titles find that only five to ten percent of eligible staff took even one course. Almost two years ago, the American Society for Training and Development (ASTD) and The MASIE Center asked of e-Learning, "If we build it, will they come?" Their study, released in June 2001, found that many of them won't.

"The average start rate for courses

*Continued on next page*

*If you build e-Learning, will they come? Studies show that they generally won't. But e-Learning designers, developers and managers can fix this! With tried and true marketing strategies like branding, positioning, and segmentation, you can influence target learners to come. Here are the "first steps" to making this a reality in your organization!*

A publication of



where participation was voluntary was a mere 32 percent, significantly lower than mandatory courses. However, mandatory courses had far from perfect start rates as well, averaging only 69 percent."

## What's the cause?

Ask learners why they're not participating and they will tell you:

- "I have 'real' work to do."
- "I'm already doing the jobs of two people."
- "I didn't know about it."
- "It's not relevant to my job."
- "I'm diverted by changes in other projects."
- "It's a waste of time."
- "It looks like I'm goofing off."
- "I tried it — but it didn't work."
- "I'm plenty busy at home already."
- "It doesn't look like fun."
- "There are continual interruptions."
- "I have higher priorities."
- "It's boring, boring, boring."
- "I already know enough of this."
- "It's klutzy."
- "It cuts my productivity."

- "I like classrooms better."
- "There are technical glitches, like the 'blue screen of death'."

With the exception of the last item, these are perceptual issues. I use the same lines to turn off telemarketers and these are also my knee-jerk reactions to tradeshow sales presentations. They are the result of low expectations going in.

Some of the perceptions are real, and addressing them calls for organizational support, shifts in values, greater relevance, and better delivery.

More often though, these objections are the result of poor e-Learning marketing practices. Learners don't understand how e-Learning can help them. Busy and harried, they resist putting anything new on their plates. No one has sold them on e-Learning's benefits. Rather than choosing e-Learning, they feel that e-Learning is being imposed on them. People may like change, but they don't like being changed.

Marketing deals with issues like these all the time. Applying a marketing mindset and techniques such as branding, positioning, segmentation, and promotion could

not help but improve the acceptance of e-Learning.

## Marketing

Marketing may not be what you think... Suppose you see an unfamiliar face in the company cafeteria and ask your colleague who the new person is. "The new hire in marketing," is the reply.

Now, just as an experiment, form a picture of this marketing person in your mind's eye. Is this someone you will like? Is this person honest? Can this person be trusted? STOP READING! Take a minute, actually close your eyes, and try to picture this individual.

OPEN UP! What did you imagine? Let me guess. You probably imagined an exaggerator, a prevaricator, an insincere and boastful person, or a snake oil salesman. I know what you're probably thinking because I'm a professional marketing guy. In Silicon Valley, I'd have more credibility if I started a presentation with "I am a doofus," than "I'm a marketing guy."

But that's not the kind of marketing I'm writing about. The kind of marketing I mean

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**Objections are the result of poor marketing practices. Learners don't understand how e-Learning can help them. Applying a marketing mindset could not help but to improve the effectiveness of e-Learning.**

is the sort of marketing that David Packard (founder of Hewlett Packard) said was too important to leave to the marketing department. I mean the kind of marketing that Peter Drucker ([www.peter-drucker.com](http://www.peter-drucker.com)) was talking about when he said the only two functions of business are innovation and marketing. I'm talking about creating and maintaining relationships with customers.

And I'm convinced that the key to e-Learning success involves treating the learner as a customer!

**Marketing today**

Twenty-five years ago, Harvard Business School taught me that marketing involved assembling a "marketing mix" of the Four P's. The P's are product, price, promotion, and place. (In some versions place becomes channels of distribution, making things a bit clearer but ruining the alliteration.) I was taught that inventing and implementing the marketing mix involved five steps:

1. Do market research
2. Design the marketing mix
3. Develop marketing campaigns

4. Launch a campaign
  5. Assess results and cycle back
- If these steps have a familiar ring, it's because you already know them as the instructional design process. Table 1 below compares these concepts.

While writing my book I read the latest textbooks in marketing, scoured professional journals, and interviewed marketing managers. I found two important things had changed since I left Harvard:

1. Marketing now looks further ahead in time. The goal used to be revenue alone. Just plain sales, fast sales, and one-time sales were fine as long as they involved a lot of money changing hands. "Marketing's job was seen 25 years ago as simply making selling easier." But today's marketing focuses on building and maintaining *relationships*. We aren't after just one-time sales; we want continual fees (annuity income, as it is sometimes called). We aren't selling magazines on the corner; we're selling lifetime subscriptions. We'll spend money up front to start a relationship that will eventually become profitable.

2. *Brand* has replaced the Four Ps. At best, the Four Ps were a checklist, not a magic formula. We're interested in what the customer sees, not what the marketer assembles. A brand is the sum of the Four Ps and a whole lot more, and if you don't have a winning brand, you won't have a winning product.

I'd written 60 pages of the book, essentially force-fitting the marketing process into the e-Learning environment, when I came to my senses. The elaborate steps, the checklists, and the nifty acronyms were inappropriate. I was walking in the footprints of previous marketing authors who drank the Kool-Aid™ and repeated the dogma.

I zapped what I'd written and replaced it with a simpler approach, which I christened "Marketing Design." Marketing design looks at customers and prospects through

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**The eLearning Developers' Journal™** is designed to serve the industry as a catalyst for innovation and as a vehicle for the dissemination of new and practical strategies and techniques for e-Learning designers, developers and managers. The **Journal** is not intended to be the definitive authority. Rather, it is intended to be a medium through which e-Learning practitioners can share their knowledge, expertise and experience with others for the general betterment of the industry.

As in any profession, there are many different perspectives about the best strategies, techniques and tools one can employ to accomplish a specific objective. This **Journal** will share these different perspectives and does not position any one as "the right way," but rather we position each article as "one of the right ways" for accomplishing a goal. We assume that readers will evaluate the merits of each article and use the ideas they contain in a manner appropriate for their specific situation. We encourage discussion and debate about articles and provide an Online Discussion board for each article.

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**TABLE 1: Marketing vs. Instructional Design**

<i>Marketing</i>	<i>Instructional Design</i>
Market research	Analyze
Design marketing mix	Design
Develop marketing campaigns	Develop
Launch campaign	Implement
Assess results and cycle back	Evaluate

three lenses:

1. Brand image and identity
2. Product position
3. Market segmentation

Everything else flows from these three perspectives, so let me tell you about each of them.

## Birth of branding

Brands first appeared on the hindquarters of cattle. Most cattle look alike, to me at least, and a brand makes it possible to tell your cattle from mine. Like the beef, let's proceed from the ranch to the grocery store.

A hundred years ago grocery carts did not exist because shoppers did not roam around making selections. Most items were packaged in bulk — barrels of pickles, crackers, flour, and apples; slabs of salt pork and dried cod; and boxes of peppercorns, cinnamon sticks, and tea. These were kept behind the counter. A clerk took your order, ladled out your portion, and wrapped your goods. The whole operation resembled today's gourmet cheese market where the clerk cuts and wraps your individual order.

Then U-Needa Biscuit™ developed a way to wrap and seal individual portions of crackers. Consumers were happy because the packaged crackers were likely to be fresher, more consistent, and more sanitary than their barreled siblings. In many American cities, you can still spot old U-Needa Biscuit ads painted on the sides of brick buildings. Local biscuit bakers began to consolidate until one of them, National Biscuit Company, owned the market.

H. J. Heinz followed the same model with pickles, American Tobacco with cigarettes, and Ivory™ with soap. Flavor, freshness, consistency, and purity — reinforced with heavy advertising. Talk about staying power: To this day, I can't think of Heinz without its "57 Varieties." Lucky Strike triggers "L.S.M.F.T." ("Lucky Strike™ means fine tobacco.") Ivory is 99 44/100% pure. And it floats! Brands were born.

The trend continues, reinforced by television and the Web. The constant barrage of advertising has more to do with branding than with immediate sales. From the classic "You deserve a break today!" and "Just do it!" to today's "What's in YOUR wallet?" television builds brands. On the Web, we have everything from My Sony to ubiquitous popup ads for gambling casinos and

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## Corporate learning is beginning the transition to self-service. Classroom instruction is one of many options. Increasingly, learners may choose from informal learning, knowledge look-up, and self-study as well as the traditional workshop.

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miniature web cameras building brand awareness.

Shoppers will pay more for a branded item than for the commodity version. Part of that excess revenue boosts producer profits; part of it fuels further promotion of the brand. It was a winning formula. Individual packaging became the norm. The grocery store no longer needed a clerk to slice the bacon and ladle out the pickles. Move the goods from behind the counters and shoppers could help themselves! They had choices. The supermarket was born.

Near that old grocery store stood a one-room schoolhouse. Within, the teacher stood behind her desk to instruct her pupils in the famous "three R's": reading, writing, and 'rithmetic. The lessons all came out of the same barrel. Today's public schools in the U.S. retain this focus on delivering commodity instruction. (Hence, President Bush calls for passing standardized tests, not deeper knowledge or better life skills.) The self-service superschool where learners/consumers make choices has yet to arrive, the Montessori System notwithstanding. This is a pity, for students, like almost all of us, love to buy but hate to be sold; they love to learn but hate to be instructed.

Today corporate learning is beginning the transition to self-service. Classroom instruction from "behind the counter" is just one of many options. Increasingly, learners may choose from informal learning, knowledge look-up, and self-study as

well as the traditional workshop. Many activities vie for the learners' time; some of them very worthy opponents such as short-term job goals, family, and time off.

It's not surprising, then, that many employees never sign up for "e-Learning" and most of those who do tend to drop out before completion.

It's high time for learning professionals to use branding to differentiate what they offer from the commodity stuff in the barrel that's not selling. More than half a century of experience has taught us a lot about how to create a brand and keep it healthy. There's more involved than painting "U-Needa Learning" on the nearest brick wall.

## Branding

What is a brand? It's a promise to the customer. A brand is the sum of the associations it brings up in the mind of the buyer. A brand is worth paying extra for — otherwise it's not a brand, it's a commodity.

Is water a commodity? It's certainly plentiful. After all, it falls out of the sky and it covers more than half the surface of the earth. Water that pours out of the tap may be a commodity, but "designer waters" are anything but! Perrier, Evian, San Pelligrino, Vittel, Calistoga, Apollinaris, Poland Spring, and many other brands command more than a dollar a bottle.

My family visited the Source at Evian, the original artesian well on the southern shore of Lake Geneva where pure, Alpine snowmelt water pours out of a hole in the wall. Locals bring their bottles by for refills. Two blocks away, boutiques and parfumeries on the main street sell Evian water in a spray bottle. The water inside prices out at \$175 an ounce! Not like any commodity I've ever heard of!

Is your e-Learning a commodity? Is it hot stuff or plain vanilla? Can it command a premium? Will learners go out of their way to get it?

## Positioning

Branding is closely allied with positioning. A product position is the relationship of the product to other things in the consumer's head. It can be quite emotional. It invariably has a component of "what's in it for me?"

I mentioned Ivory Soap earlier. It's a classic brand. A fellow student in my marketing class at Harvard Business School

later became brand manager for Ivory. Then he became a mogul in the designer water business. (I am not making this up — but that's another story.)

Do Ivory customers buy soap? Heavens no! They buy clean faces, mild baths, and clear skin. (And the convenience of finding a floating bar of soap in the tub.) Do people buy drill bits? No! In and of themselves, drill bits are useless. People buy the holes the drill makes. Don't need a hole? Then you don't need a drill bit. Charles Revson, the "Rev" of Revlon, said, "In the factory, we make cosmetics but in the stores we sell hope."

### Positioning and branding e-Learning

I've asked more than 500 e-Learning professionals to describe the positioning of their e-Learning. I ask them to tell me about the clean faces, not the soap; the hope, not the cosmetics. They tell me their e-Learning is modular. It's flexible. It saves time. These are all true — and good. But will they get an employee jazzed about doing e-Learning? I doubt it.

Isn't it more effective to position e-Learning as:

- A pathway to promotion?
- A way to make work easier?
- A better position in the job market?
- Creating more value to your next employer?
- The ability to excel professionally?
- A good way to stay current?

Nobody really wants e-Learning. They only want what e-Learning gets them. But if e-Learning's value proposition fails to answer the learner's question, "What's in it for me?" the learner is not going to buy it.

Consider: How do you position your e-Learning with respect to what's in it for the learner? The six positions just suggested are not universal answers, but one of them might be good for a start.

Once we've selected our position, it's time to look at branding our e-Learning. A good place to start is by assessing how our customers see us (our "brand image"). Here's a question that can help to elicit that perspective: "If your e-Learning program were a car, what brand would your customers say it is?"

To maximize your learning from this article, shut your eyes again and answer the question yourself for your own organization. Take five or ten minutes on this, because I want you to think about why you're choosing the brand of car (or other kind of vehi-

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## Is your e-Learning a commodity? Is it hot stuff or plain vanilla? Can it command a premium? Will learners go out of their way to get in?

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cle) that seems closest to your e-Learning.

I'll give you a few of the responses, along with their rationales, that I heard from participants at *The e-Learning Guild Annual Conference 2002* in San Diego in November. I'll also offer my thoughts about each in *italics*.

**Chevy.** We're reliable, functional, and not flashy. *Why be dull?*

**Skateboard.** Because we've shifted from a green-screen mainframe environment and the younger set, the skateboarders, are the only people who understand the Internet and can use a mouse. Also, we're still pretty low-tech. *Why leave out the older workers?*

**Jetta.** We're just getting started. The Jetta is functional. It will do until we get out of school. Later we'll trade up. *You've got to start somewhere. It's a good idea not to oversell what you've got to offer.*

**Cute little electric car.** We're friendly and fun. It's an economical, handy vehicle for short trips. We'd keep a real car, as back-up, in the garage. *This appeals to the learners. Unfortunately, this company didn't have a spare vehicle in the garage, so they can only go so far.*

**Public transportation.** We're reliable. We'll get there. We run on schedule. Of course, we may not be going where you want to go. *Don't expect this to sell very well.*

**Lincoln Town Car.** Most of our program is geared to executives and managers. They demand a comfortable, conservative ride. *The rest of us have to walk?*

By the way, after answering the car question yourself about your organization consider what sort of vehicle would the learners in your organization say you provide? Would most of them choose the same sort of vehicle that you did? What do you make of that?

Is your e-Learning branded? Does it have an enticing name? Is it packaged with a consistent look and feel? Does it promise benefits to its customers? Are the benefits communicated to the customers?

When I advise large organizations how to get more out of their e-Learning, we ask the learners these questions. Then we look at the disparity between their views (the e-Learning's brand image) and the intentions of the administration (the brand identity).

### Segmentation

A segment is nothing more than a part of a market that you want to treat differently from another. Examples are new-hires, the sales force, people in EMEA, senior vice presidents, truck drivers, or people with brown eyes.

Clearly, new hires need orientation, the sales force needs product knowledge, etc. Wait a minute! Did he say people with brown eyes? Actually, brown-eyed folks are not a segment. Why? Because we don't receive any value from treating them differently from others! (I was just seeing if you were paying attention.)

How about young versus old? Is age a valid way to segment learners? Yes. Why? Because oldsters learned how to learn in different ways from youngsters. Young people have always multi-tasked, have grown up with computers, and could program TiVO in their sleep. Oldsters have never played Doom, get dizzy watching the fast cuts on MTV, and sometimes have the patience to read a book. You better treat young learners differently than old learners.

When we were in the "What kind of car?" exercise, one person brought up a segmentation issue — but didn't follow it all the way through. Remember the Lincoln Town Car? The individual selected it because their training was focused on executives and managers, and the brand identity was fitting: "Corinthian leather."

Isn't it curious that no one came up with a fleet of different cars? We could provide Lincoln learning for the execs, BMW learning for hard-charging sales execs, Volvo learning for the safety inspectors, SUVs or pickups for the workers on the assembly line, etc. Remember the segmentation strategy at GM before the company got out of touch with its customers? Chevrolet was the entry-level workhorse. Pontiac was up a notch in excitement. Buick was dependable and racy. Oldsmobile was innovative and

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- **A draft of the first paragraph**, written to grab the reader's attention and identify the problem or issue that will be addressed.
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affluent. Cadillac was luxury and excess.

Segmentation is tricky. You can't satisfy all of the customers all of the time. GM could not have supported a dozen brands cost-effectively. But when your customers demand different approaches, you must act. Look at what happened to GM when economies of manufacturing led to Cadillacs that looked like Chevys. Let's not go there.

#### The elevator pitch

Coming up with an effective Marketing Design is not an academic exercise.

Consider the tale of Laura, who had joined a regional bank to kick off an e-Learning program. The individual who had initiated the program had done a poor job of coordination and had left the bank.

Laura called the assistants of the bank's seven most senior executives. She asked each for fifteen minutes of the executive's time.

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If e-Learning's value proposition fails to answer the learner's question, "What's in it for me?" the learner is not going to buy it.

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She began each appointment by noting that since she had asked for only fifteen minutes, she had but two questions. First, "Do you know how e-Learning can improve the bottom line of the bank?" Most were not aware of what e-Learning really was, and this opened the door for Laura to explain. Second, "What issues keep you awake at night that you think e-Learning might be able to help?"

Five of the seven execs told their assistants to hold all calls. The other two scheduled follow-up meetings. The issues Laura deals with are not whether to implement e-Learning, but how. The execs have nicknamed her e-Laura and she has the ear of senior management.


Not everyone will be as gutsy as Laura, but we can all be prepared.

If you don't have a good "elevator pitch," you're not up to speed. Your elevator pitch

# About the Guild

is what you say when your CEO steps onto your elevator and asks what you're doing. You have about six sentences to capture his or her interest. You'll probably find that it includes the three basic elements of marketing design: your brand, your position, and your target segments.

Pretend I just morphed into your CEO and walked into your elevator. Got your six compelling sentences ready?

"You're new here, aren't you? Tell me, what do you do for us?" 

## AUTHOR CONTACT

Software and training veteran Jay Cross coined the term "e-Learning." He is CEO of e-Learning Forum, a 1200-member think tank and advocacy organization. Five years ago, he founded Internet Time Group to help organizations learn and perform on Internet time.

Today he coaches corporate executives on getting the most from their investments in e-Learning, collaboration, and visual learning. He is co-author of the recent book *Implementing eLearning*.

In previous lives, Jay sold mainframes the size of SUVs, designed the University of Phoenix's first business degree program, and joined the Inc 500 for taking a training start-up to prominence in less than three years. He is a founding fellow of the Meta-Learning Lab. Jay is a graduate of Princeton University and Harvard Business School. He lives with his wife Uta and two miniature longhaired dachshunds in the hills of Berkeley, California. Contact Jay at [jaycross@internettime.com](mailto:jaycross@internettime.com).

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