

The Forum Report

e-Learning: Approaches to Implementation

A mix of classroom and web is being embraced as the future of workplace learning, but the best methods for implementing a blended solution are not yet well understood. Flexibility, cultural fit, and a smooth bridge from traditional to web-based learning were emphasized by the eleven Fortune 1000 participants in a focused study conducted by The Forum Corporation.

Key findings:

What factors lead to successful e-learning? All respondents describe their organizations as taking their first steps with e-learning. Successes, so far, are scarce. Where e-learning has worked, three frequently cited factors are:

1. Starting small
2. Combining online and classroom learning
3. Making the business case for the learning clear

What's driving your move toward e-learning? Respondents cite limited resources, limited time, increased opportunity costs, and better technology—all contributing to a push to get information out to more people with greater efficiency. Neither user-demand nor the need for straight cost savings are emphasized as drivers.

Which approaches are best for you? We presented six implementation approaches to e-learning (see figure 1) and asked for reactions.

- Most respondents see all six approaches as potentially viable, depending on the audience and the situation, and stress the need for flexibility.

- The Catalog and The Electronic Surround are the two approaches most frequently cited as “likely to be adopted in the near term.”
- The Club Sandwich and The Virtual Seminar are seen as appropriate and practical for certain audiences—especially senior managers—but as too complex or sophisticated for others.
- Online collaboration and online 360° feedback are seen as valuable by some and problematic by others. The organization's culture can make or break these features.

What are the must-have features in an e-learning system? “Top-quality content” and “links to a robust competency model and/or best practices” are cited by half the respondents as necessary features. Opinions about the importance of all other features are mixed.

Issues

More and more companies are regarding the classroom as only one of many ways to deliver learning and development to employees. New web-based technologies are replacing the classroom in some cases, complementing the classroom in others. The “blended solution” is being embraced as the future of workplace learning.

This is one in a series of research reports on workplace learning. Upcoming reports will explore e-learning, outsourcing and learning strategy.

But constructing courses and curricula using just one delivery method—the classroom—was never a cut-and-dried task. Now, with the emergence of multiple delivery methods, the best methods for implementing learning and ensuring results are even less clear.

The Forum Corporation has conducted extensive research on the appropriate delivery methods for different types of learning. With this research as background, we set out to gather some leading HR and training professionals' reactions to several specific implementation plans for e-learning or blended-learning solutions. We put together six different implementation approaches based on our experience developing results-producing learning systems for our clients. We then interviewed 11 directors of Human Resources or Training and Development in 10 North American *Fortune 1000* companies to learn about their experiences with e-learning and their reactions to these implementation approaches. The industries represented include financial services, chemicals, health care, and professional services. (See page 4 for methodology.)

Figure 1. Six Implementation Approaches

Catalog:

A set of self-paced, stand-alone, web-based courses or modules offered via a learning portal.

Sandwich:

A self-paced, web-based course “sandwiched” between two live, facilitated events (such as conference calls)—one to set up the learning, and one to debrief it.

Electronic Surround:

Web-based prework that introduces fundamental concepts before learners attend a classroom session, and web-based reinforcement that extends the impact of the classroom session.

Club Sandwich:

A live introductory event, followed by web-based self-paced learning, followed by an on-the-job assignment and report-out, followed by a live debrief.

Virtual Seminar:

Web-based learning consisting of a mix of self-paced elements and asynchronous collaboration with a facilitator and colleagues.

Feedback-Coaching-Learning System:

Web-based 360° feedback that indicates performance gaps, plus coaching and learning resources to close the gaps.

The 10 companies are, for the most part, in the experimental stages with e-learning. Their current approaches include:

- Beginning to build an online university that matches content to competency models
- Offering a catalog of off-the-shelf web-based courses
- Using web or CD technology to extend the impact of classroom workshops
- Introducing an online performance-management system
- Experimenting with online collaboration and community-building tools
- Offering informational resources on an intranet

Insights

Our respondents point to the importance of carefully considering many factors when making any decision regarding e-learning, as opposed to picking simply the latest or most all-encompassing technology. Three factors, especially, should significantly impact how an e-learning solution is built:

- **The intended audience and their needs:** For example, is it a team of senior managers for whom long-term learning projects linked to the job make sense? A group of salespeople who need faster access to product descriptions? Customer-service providers who require on-the-job reminders of specific service skills? Each will require a different e-learning approach.
- **The type of content:** Is it technical skills, soft skills, product information, policy information, or learning associated with a major change initiative? For example, most of the respondents express some skepticism about moving soft-skills development entirely away from face-to-face settings, because of the need for realistic practice and feedback.
- **The stage the organization is in with respect to its adoption of e-learning:** Respondents repeatedly emphasize the need to “start small” and “build bridges” between how the organization learns today and how it needs to learn in the future. Most are seeking ways to make a smooth, incremental transition from c-learning to e-learning, where warranted.

Figure 2. Choosing Features for an e-Learning System

Suppose you are getting close to implementing a very sophisticated e-learning system that addresses soft skills for an important audience. You have just heard that your budget for the system has been cut in half and you've lost several key members of the implementation team, so you have to scale back.

● Which three features would be the first ones you would eliminate?

■ Which three features would you absolutely keep?

(Interviewees sometimes named more or fewer than three.)

Features	Interviewees											Total
	1	2	3	4	5	6	7	8	9	10	11	
A. Top-quality, well-researched content		■	■		●	■	■	■	■	■		1
B. Ability to update and customize the content weekly	■		●	●	■		●	■			●	4
C. Online role-plays and simulations				●	■	■			●			2
D. Synchronous, facilitated events for group discussion of job issues		●	●	●	■							3
E. Synchronous, facilitated events for skill practice		●			●							2
F. E-mail access to an instructor					●	■						1
G. Asynchronous discussion/coaching/feedback with a group (learners and instructor)		●					■		■			1
H. On-the-job assignments, with report-out requirements						●		●	●			3
I. Online 360° survey and feedback capabilities							●		●	●	●	4
J. Links to a robust competency model and/or best practices	■		■	■	■		●	■		●		2
K. Tools to help learners create personal learning paths and action plans	■		●									1
L. Post-course reinforcement mechanisms (reminders, managers' tips, new resources, discussion groups)				■						■		0
M. Printable job aids and reference materials	●						■			■		1
N. Separate guides, tools, and resources for participants' managers	●					●		●			●	4
O. Testing of learners and reporting of test data				■		●					■	1
P. Mechanisms to measure on-the-job behavior change and business results	●	■			■			●	●	●		4
												2

Because of these different needs and situations, multiple approaches to e-learning are required—so flexibility in any solution is key.

Flexibility is also necessitated by the great diversity of opinion, at this point, about which features are essential to an effective e-learning system. In the interviews, we asked two questions about the features people saw as “dispensable” and “indispensable” to an e-learning solution. Respondents’ answers to these questions are captured in Figure 2. Note the striking differences of opinion—never more than seven and usually no more than two people agreed on the importance of any one feature.

Finally, many respondents note how useful it is to see specific implementation approaches laid out. At this point, there seems to be a lack of concise, practical presentations of various e-learning approaches for HR/training professionals to draw on. Learning providers have focused their research and consulting on the design of individual web-based courses or on the technical issues underlying learning management systems, and not on e-learning implementation. More thinking is needed to develop an equally robust toolkit of best practices for the implementation of e-learning solutions and their linkage to performance and business issues.

Implications

The findings suggest that, for soft-skills training, a top-quality e-learning provider should offer at least the following three approaches.

The Electronic Surround. This approach, which our respondents name as “most likely to be adopted in the near term,” comprises three steps:

- **Web:** Self-paced learning covering fundamental concepts and skills and arranged in small chunks. It includes prework assignments for the classroom session.
- **Classroom:** A facilitated session designed to help learners practice the skills in an integrated way, receive feedback, and exchange advice on how to apply the skills on the job.
- **Web:** Reinforcement resources, including job aids, tool kits, application suggestions, and continuing discussions.

The Electronic Surround gives a group of learners the convenience of self-paced learning plus the richness and accountability of face-to-face practice and application. This approach may be impractical, however, when individuals need to learn essential concepts immediately and there is not a large enough group to warrant a classroom session. In this case, organizations may turn to an online learning catalog.

Catalog. Also named as “most likely to be adopted in the near term,” this approach involves offering a set of self-paced courses to all employees or specific parts of the employee population. Courses are constructed so that the web-based components can stand alone without a classroom session, offering the organization maximum flexibility. Where face-to-face skill practice, feedback, and application help are needed, tools and guidelines are provided to managers or coaches to use one-on-one with learners. To be most effective, the catalog must be linked to a performance management system or employee development system so that individuals have direction and accountability for the courses they take.

Virtual Collaboration: Although not all organizations are ready, either culturally or technologically, for virtual collaboration, options should be included in an e-course to allow for easy expansion to this type of enhanced learning. Examples include

threaded discussions, online coaching and mentoring, facilitated chat, instant messaging, and virtual classrooms.

Like self-paced e-learning, these virtual collaboration methods can either complement a classroom session (for example, by allowing a group to meet one another and the facilitator before they attend) or be independent of the classroom (for example, by providing for a facilitated, online discussion of best practices that relate to some self-paced learning).

The Forum Corporation, an FT Knowledge company, is a global workplace learning corporation that helps large, leading businesses create learning strategies, develop learning solutions, manage their learning organizations, and deploy their brands. Its clients include more than 130 members of the Fortune 500.

For three decades, Forum has helped companies improve leadership, management, team-building, sales, sales management, and service excellence. It is the largest provider in the world of outsourced training management services. Through its Branded Customer Experience® service, Forum helps businesses turn their brand promises into employee behaviors and processes that create lasting customer loyalty.

Forum offers comprehensive approaches to curriculum design and management, facilitator services, e-Learning, executive coaching, implementation planning and measurement. Performance Compass™, the company’s award-winning web-based development system, combines cutting-edge technology with comprehensive job performance feedback and immediate access to world-class learning resources.

Headquartered in Boston, Massachusetts, Forum employs 700 associates and has offices in seven U.S. cities, Canada, the United Kingdom, Hong Kong, Singapore, Australia, and New Zealand, with affiliates around the globe.

For more information about Forum, visit www.forum.com.

Methodology

There were three stages to the study:

- Stage 1** Six approaches to e-learning researched, designed, and documented. Interview protocol created and reviewed. Companies identified.
- Stage 2** Eleven 30-minute telephone interviews with HR and Training and Development professionals conducted.
- Stage 3** Data synthesized and analyzed.