

Rapid E-Learning: *What Works*TM

*Market, Tools, Techniques and Best Practices for
Building E-Learning Programs in Weeks*

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Executive Summary

In 2003 and 2004 the use of E-Learning has grown dramatically. Companies of all sizes can now rely on Internet-based training and education to roll out a wide range of informational and competency-based programs in a fast and scalable manner.

In our research we find that a revolutionary change is taking place. There are a broad range of training and learning problems that are time-critical. These problems have the need for urgent development (“get this program out in the next few weeks”) and often short shelf life (“in 3 months this will be out of date”). Often these programs have smaller budgets, smaller teams, and require intimate involvement of subject-matter experts (product managers, sales managers, HR managers, etc).

89% of the organizations we surveyed need to develop e-learning in **three weeks or less.**

We call this new category of program “Rapid E-Learning.” It is a whole new approach to Internet-based training – one that changes the development model, leverages new tools, and dramatically changes the economics of content development.

This report summarizes our Rapid E-Learning™ research findings – reviewing the market size, when and how to apply this approach, best practices, tools, and case studies. Our findings tell us that this new approach can revolutionize the process of developing and deploying information in organizations worldwide. With a compound growth rate of over 80 percent, this new approach is going to change the way training is built, deployed, and managed.

The Need for Rapid Development and Deployment

For decades, technology-based training has promised to give corporations, universities, government, and non-profit organizations the power to increase the scale and reach of training. When it is necessary to reach a large audience in a consistent and cost-effective way, e-learning is the answer.

As companies have rushed into e-learning, however, many have found that the time and cost to build excellent content sometimes overcomes these advantages. The “traditional” approach takes many months to build and can cost tens to hundreds of thousands of dollars per instructional hour.

The Biggest Challenge in E-Learning: Time

We have been watching this market for several years. In our most recent surveys to e-learning developers, we find that their biggest challenge continues to be time. Developers and managers complain that development times are too long and they lack trained resources to get programs developed.¹ Given the rapid state of change in most industries, this should not be a surprise.

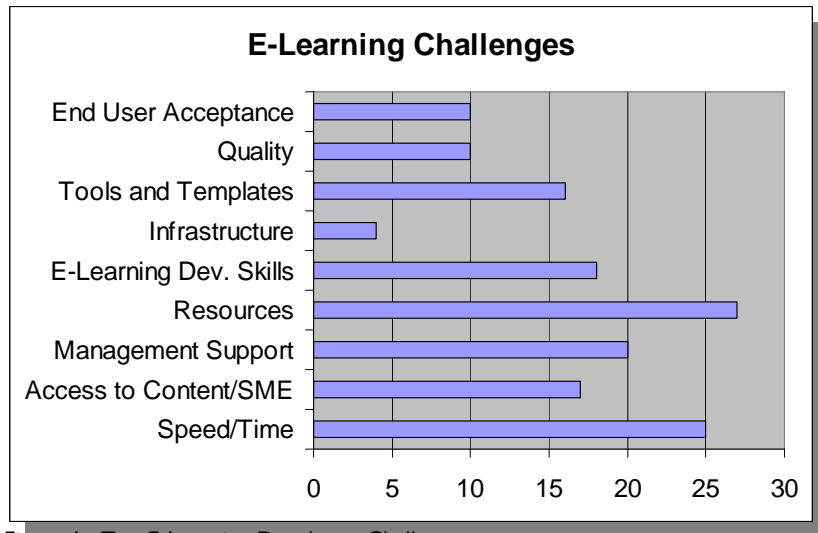


Figure 1: Top E-Learning Developer Challenges

Why is this? Today most e-learning programs are being developed with the waterfall approach. A subject matter expert explains the content; an instructional designer creates a design document and project plan; a web-developer builds interactivities and HTML pages; a QA engineer tests the course; and then, a few months later, an online course is launched.

Although this approach is proven and works well, it breaks down for many time-critical problems. It demands a team of skilled professionals and it can take months to complete. The results from our survey (Figure 1: Top E-Learning Developer Challenges) show that this waterfall process simply takes too long and costs too much for many business situations. *Often time the business problem has changed during the development of the course!*

Rapid E-Learning: A New Paradigm

Imagine the impact that the microwave oven had on cooking. It did *not* do away with the oven, but it did enable millions of people to eat popcorn and instant soup. E-Learning needs a fast “cooking” option when you have to provide training *NOW*. As this study shows, Rapid E-Learning, when applied to the right problems, can solve a wide range of training challenges in a highly efficient way – freeing up valuable resources to focus on problems that demand the more traditional approach.

¹ Spring 2004 survey of 228 e-learning developers, primarily in US.

Rapid E-Learning Defined

In our research, we found that companies who are creating e-learning content use a cross between knowledge management and e-learning. *Knowledge management* uses collaborative technologies to encourage subject matter experts to share their knowledge and *e-learning* delivers skills and knowledge in a streamlined and methodical way. The intersection between knowledge management and e-learning seems to hold the solution for creating more e-learning content in less time with fewer resources.

The Rapid E-Learning category is defined by the following criteria...

Rapid E-Learning is a new category of online training programs built with new processes and tools. Rapid E-Learning programs can be developed in weeks and are often authored by subject-matter-experts.

- Courseware which can be developed in less than three weeks
- Subject Matter Experts (SMEs) act as the primary resource for development
- A well-known tool (e.g. PowerPoint) or user-friendly templates form the starting point for courseware
- Simple assessment, feedback and tracking provided
- Media elements which enhance learning but do not create technology barriers may be included (e.g. voice)
- Learning modules can be taken in one hour or less, often in less than 30 minutes.
- Synchronous (live) and asynchronous (self-paced) models may be utilized.

The two major elements in this definition are **short timeframes** and **ease of development**. The key to a successful Rapid E-Learning program is having a development process (including tools) that makes it easy and quick to develop a course.

Rapid E-Learning is sometimes called “**disposable training**” because it solves problems with short shelf life. We do not use that term because it diminishes the value and potential to build long-lasting programs rapidly.

Categories of E-Learning

Our philosophy is that there are different types of e-learning, just like there are different types of classroom training. In the classroom, there are roadshows, seminars, and hands-on workshops. Styles and timeframes vary by content, budget and audience requirements. E-Learning has the same types of variations. We think categories of e-learning also vary by content, budget, timeframes and audience requirements. When we surveyed the market about their e-learning development practices, we found that e-learning development practices generally fall into three categories:

- Rapid
- Traditional
- Strategic

Rapid: Rapid E-Learning is often developed in response to urgent business needs, such as a product launch or competitive situation. It may also be developed as part of a continuous update program, or when the content has a short shelf-life. Most Rapid E-Learning courses are developed in response to a request by a line of business organization. Rapid E-Learning is usually focused on awareness and immediate action and the modules are created in a matter of days or weeks. They are developed internally, *with little or no budget* and the base content is often developed by SMEs who use PowerPoint or a set of authoring templates.

Traditional: Traditional E-Learning is focused on skills. It's often part of an annual training build plan to meet skill needs within an organization or group. Sometimes Traditional e-learning is developed in response to needs assessment findings or a recognized skill deficiency in the organization. It may also be developed as a preparation component for a professional certification program. With Traditional E-Learning, a build or buy decision may be made to ensure the best use of the training budget. These programs are typically developed in 3-11 weeks by a team of training professionals who may work internally or be contracted externally.

Strategic: Strategic e-learning programs are developed in conjunction with an organizational development or change strategy. Typically, these major change initiatives take place over a matter of months or years and the learning components are developed for each phase as the organization progresses through them. These programs are usually developed by cross-functional team of professionals and rolled-out over a period of 3 months or more. The team may consist of employees or contractors, or both. Many strategic programs are blended – mixing classroom training with workshops, instructor led programs, conference calls, and other media.

This table summarizes the differences between the three categories of e-learning.

Category	Development Timeframe	Budget for Development	Developed by ...
Rapid	< 3 weeks	Staff of 1-3 professionals and little or no budget	SMEs with templates and training professional guidance
Traditional	3 to 11 weeks	\$5,000- 30,000 per instructional hour	Training professionals, such as Instructional Designers, Instructors, Course Authors, etc.
Strategic	12+ weeks	Often blended, costs can go higher.	A cross-functional team that includes HR, Instructional Design and others.

Figure 2: Comparison of E-Learning Categories

As you decide on your development strategy, you should categorize each of your programs into one of these three types.

Size Growth of Rapid E-Learning Market

How big is this marketplace? We believe it is large and growing rapidly. According to our industry survey², we found that if we characterize programs into the three types above, already more than 1/3 fall into the “rapid” category.

- 36% Rapid E-Learning courses
- 37% Traditional E-Learning courses
- 28% Strategic E-Learning courses

72% of companies surveyed told us that “Some or Most” of their training programs were time critical in nature.

“Time critical” means that the program must be developed in weeks and may be out of date in months.

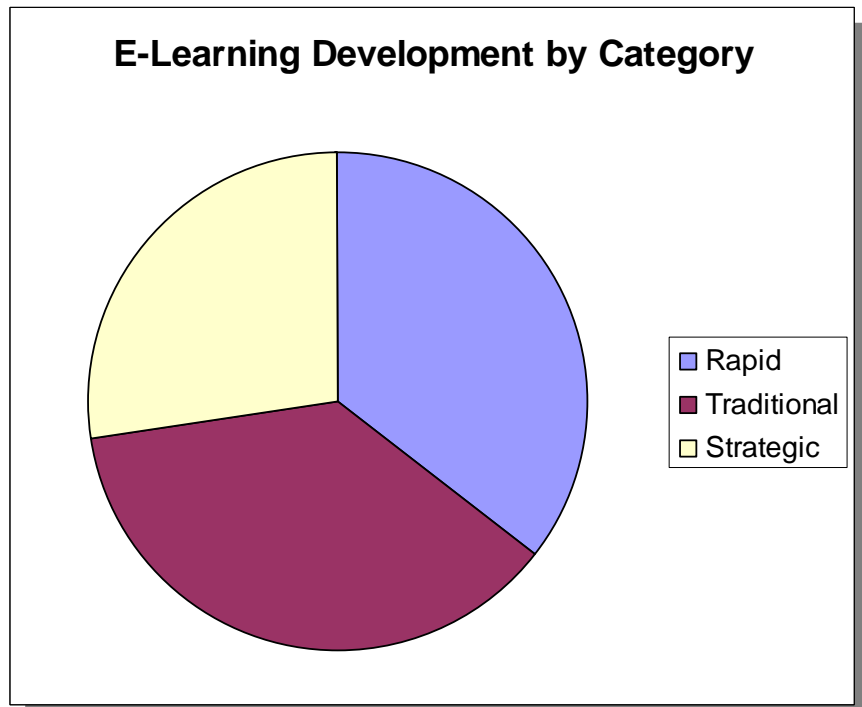


Figure 3: E-Learning Development by Category Today

When asked “how many of your programs are time-critical in nature,” the survey told us that 72% of companies say that “some or most” of their training programs are time-critical. “Time-Critical” means that they must be developed in weeks and could actually become out of date in a few months.

Lines of business are demanding more e-learning in shorter timeframes and the e-learning technology market is finding ways to accommodate their requests. *As new tools become available we believe that in the next five to ten years, Rapid E-Learning development tools may become as ubiquitous as office software.*

² 228 respondents, e-learning developers, Spring of 2004.

Change in Mix of Corporate Programs

As usage of Rapid E-Learning grows it will expand the total e-learning market. Based on market trends, we estimate that in three years the e-learning market mix will segment itself as follows:

- 50% Rapid E-Learning
- 35% Traditional E-Learning
- 15% Strategic E-Learning.

This shift means that a significant amount of training resource will be offloaded from the “rapid” problems to focus on the more traditional and strategic problems. *For training managers this means a shift in resources from “developers” to designers and builders of processes and templates.*

Market Growth in E-Learning Tools

In spring of 2003 we developed our worldwide E-Learning tools market forecast. In that study, “E-Learning Development Tools: What Works™”, (available at <http://store.bersinassociates.com>), we forecast the worldwide development tools market to be growing at 36.5%, from \$235M in 2002 to \$816M in 2006.

This market consists of a wide variety of tools which include dedicated e-learning tools, traditional web development tools, assessment tools, and other office-desktop tools used for online training.

The growth in the “rapid segment” is rapidly changing this market. Companies like Macromedia with Breeze, are seeing explosive growth in their “rapid e-learning” tool sets. We believe that this sub-market is currently experiencing a growth rate of over 80% compound growth rate. *Today we believe the Rapid E-Learning Tools market is approximately \$65M and will grow to approximately \$410M by the end of 2006.*

The Rapid E-Learning Tools market is undergoing explosive growth – a current growth rate of over 80%.

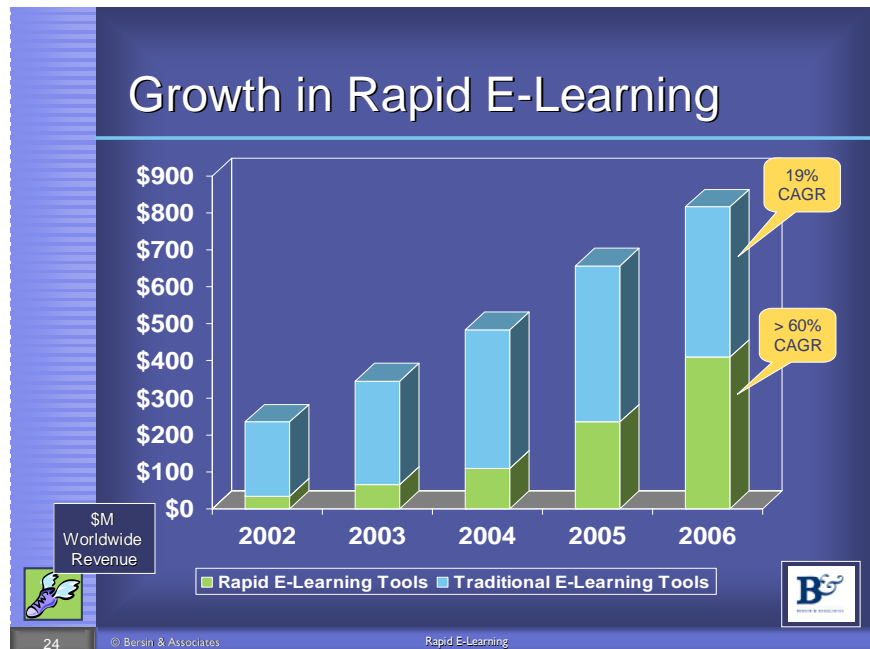


Figure 4: Growth Rate of Rapid E-Learning Tools Market

Rapid E-Learning Tools

There are two types of Rapid E-Learning Tools: Self-Paced and Live (e.g. scheduled).

- **Self-Paced** – Participants take self-paced training whenever their schedule permits. In general, self-paced tools fall into two categories: 1) Office SW Authored (e.g. PowerPoint) and 2) Template-Driven. Most self-paced tools include the ability to create learner interactions, such as quizzes, assessments and surveys. Recorded Live sessions can become Self-Paced Rapid E-Learning courses.
- **Live** – Live (e.g. synchronous or scheduled) sessions occur at a specific time and use collaborative tools to interact with participants in real-time. Most Live learning offerings include features that can help gauge response & comprehension. They also have chat functions and audio components, so that participants can benefit from questions and discussions.

Choosing Between Live and Self-Paced

There are several factors that should be considered when choosing between Self-Paced and Live learning tools, including:

- Availability of audience time
- Value that the audience places on interactions with the SME
- SME availability to teach
- Connectivity speeds
- Objectives of the program
- Audience comfort level with computers
- Motivational factors
- Language translation requirements
- Audience prerequisite skills
- Development speed

This table lists some factors that should be considered when making a choice between Self-Paced and Live Rapid E-Learning. If one of these factors is present, you should learn toward choosing the type of Rapid E-Learning under which the factor is listed. If you have factors in both columns, consider blending both types of Rapid E-Learning to offset some of the barriers you may face if you choose one type or another.

When to use Self-Paced	When to use Live
<ul style="list-style-type: none"> • Hard to schedule learners into scheduled sessions • Learners work at home or off-hours • SME is not available to teach • Low bandwidth or no connectivity • Widely varied prerequisite skills. 	<ul style="list-style-type: none"> • Need structure to drive attendance • High value placed on SME or peer interaction. SME's are experts, celebrities, or key managers. • Attitudinal or soft-skill objectives that would benefit from discussion • Audience discomfort with e-learning in general.

Figure 5: Choosing between Self-Paced and Live Formats

The Macromedia Breeze products are based around PowerPoint conversion to Flash.

Macromedia Breeze

This is the original Rapid E-learning product and it has some unique features that make it very appealing. This product line is the only one that combines a Self-Paced product with a Live offering.

Breeze Presentation and Training (Self-Paced)

The Macromedia Breeze products are based around PowerPoint conversion to Flash. Once Breeze converts a presentation, you can use it to deliver a Live Rapid E-Learning session. Or you can record narration for each slide, add some questions and you've got a self-paced course. The Live sessions can also be recorded and made available for replay. All in all, this product provides a wide variety of content presentation options.

The Self-Paced interface is very intuitive, and it greatly simplifies the process of building a course into three steps.

1. At the click of a button, a PowerPoint presentation is converted to Flash and published on the Breeze server.
2. The recording tools make it simple to add commentary for each slide.
3. With the question creation tools, you can add multiple choice or true/false questions.

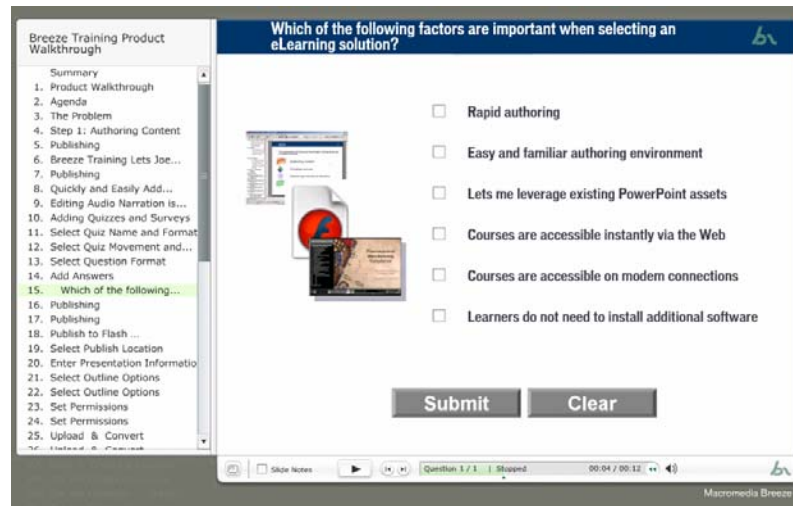


Figure 6: Breeze User Interface

Breeze requires a server – which you can either purchase or license through a hosted model. The Breeze solution includes all the administration, management and reporting functions that you will need – and can integrate with your LMS.

Breeze Live (Live)

Breeze uses the ubiquitous Macromedia Flash Player, to deliver instant web meetings without requiring special plug-ins or media players. This product removes many of the technical support barriers that keep users from using Live products when they need to do Rapid E-Learning.

It provides a flexible interface that allows users to custom tailor the size and placement of the virtual classroom elements for each class.

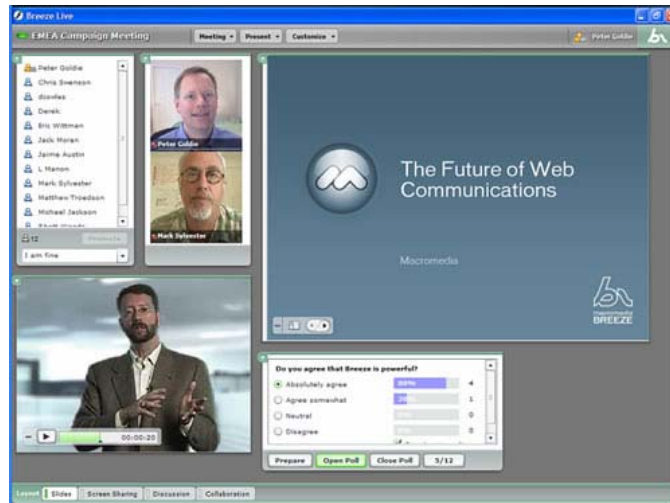


Figure 7: Breeze Live Flexible Interface

Breeze is sold in as a hosted or licensed offering, and includes:

- An administrative system to track courses and learners
- Self-Paced development tools
- Virtual classroom tools
- Recording and playback capabilities

In summary, Breeze provides a wide variety of intuitive formats for presenting PowerPoint-based learning material. The administration tools make it easy to track and manage a Rapid E-Learning program. And with Breeze, you can get your Rapid E-Learning program up and running in a matter of days. Breeze makes it easy to collaborate, communicate and train online. This product is a great all-in-one solution for those who need both a Live and a Self-Paced solution.

Macromedia Captivate

Macromedia Captivate enables an SME to create demonstrations and application simulations in a fraction of the time that it might take with other products. Captivate automatically captures all screen events and annotates them with text captions as you go through a task on a computer. Users can add animated highlights, video, audio, interactions, quizzes etc, creating very engaging content. This product includes template-based question development tools for creating quizzes and assessments.

The high quality Flash output has a small file size and can be used on the Web, on CD, with Macromedia products, Learning Management Systems and Questionmark Perception. MS Word-based handouts and job aids can be generated instantly. Captivate simulations enhance the Breeze experience, both Self-Paced and Live, by allowing each participant to practice a simulated, hands-on procedure.

Captivate can be used effectively with Breeze Live meetings, which allows presenters to turn each passive viewer into an active participant.

Each author requires one license, which has a retail price of \$499 (promotional discounts may be available via the online store). There are no royalty fees for Flash movies or simulations created with Captivate.

Rapid E-Learning Case Study

Novell Channel Training

Novell is a \$1.1 billion software and services company focused on network, security, and integration services to large and small organizations worldwide. The company's sales channels include direct sales, service, and a large array of reseller and integrators that provide more than 50% of the company's revenue.

The company prides itself on innovation and new product introductions, with more than 20 new products every year. Channel resellers must be certified and trained continuously. How could Novell sales and channel partners possibly keep up with the rapid release of new products and services?

In 1999, Novell embarked on an innovative approach – using “Rapid E-Learning” solution which enables channel partners to learn anytime and anywhere. This new approach leverages the many subject-matter-experts (SME's) in Novell to produce online training in days instead of weeks or months.

Business Problem:

With more than 5,500 channel partners, Novell relies heavily on the skills and information of channel sales to drive revenue. Within these channel partners, there are Certified Novell Salespersons (CNS) who must stay current on Novell products and services. As a result, Novell needs a training solution which is trackable and easy to measure – to make sure that partners are ready to sell new offerings and sales training is reaching the right people.

There are several training challenges:

- This audience is very busy and needs to spend as much time as possible in front of customers. Scheduling instructor-led training is very difficult, and will never reach the entire global audience.
- The content for these topics is often deeply buried in the minds of product managers at Novell. These product managers themselves (Subject Matter Experts or SME's) are very busy and rarely have time to sit down with a training manager to develop courses.
- The wide distribution of partners makes any kind of physical training nearly impossible – and with the rapid change in products and services, it is necessary to update the content often.

How could Novell deal with the proliferation of training needs when the audience is distributed and often not available for instructor-led classes?

Case Study Challenges – Novell



Novell.

➤ *Challenge: Deliver current sales training to 5,500 channel partners*

Cycle Time	New products and services announced regularly 20-30 announcements per year.
Training Challenge	Audience is busy and needs training on their own schedule. Material is “informational” not “skills building”
Scale	Thousands of learners globally, impossible to schedule webinars or conference calls
Resources	SMEs are busy product managers with little time to develop training
Tracking	Need to monitor and track usage to measure channel readiness



Figure 8: Novell Training Challenge

Solution: Rapid E-Learning

Novell embarked on a new solution to this problem which we call “Rapid E-learning.” By using a product from Macromedia called Breeze (formerly Presedia), Novell could take content directly from subject-matter-experts’ PowerPoint slides, publish it to the web, and distribute it to learners.

Freeing the Subject-Matter-Expert Bottleneck

As anyone who has tried to develop training knows, the most important source of information for any program is in the head of subject-matter-experts. In this case SME’s are busy product marketing managers who spend all day with engineers, customers, and marketing programs. Although they have some training focus, their general understanding is the product itself – not how to sell it.

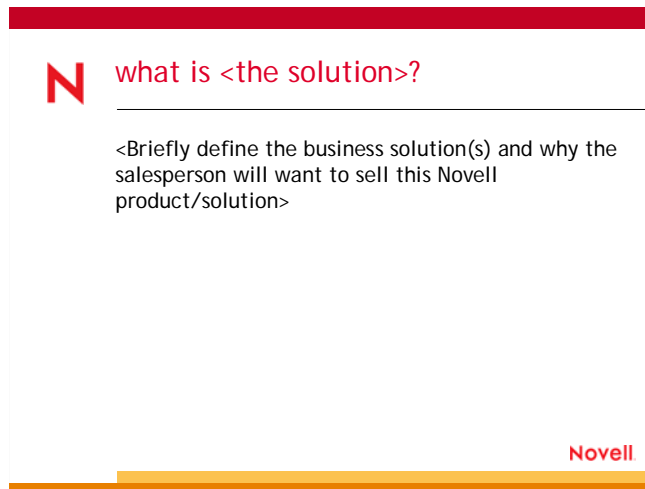
Not only are they busy, but rarely do subject-matter experts have a background in instructional design. When describing a product to sales people, their natural tendency is to describe “what the product is and how it works” instead of “how to sell it.”

The answer was to provide subject matter experts with a very well designed PowerPoint template, which can serve as a detailed plan for developing their “rapid e-learning” content.

The template, as shown below, has approximately 20 slides – each of which walks the SME through a series of questions. The slides each have notes attached which clearly tell the SME what information is needed on each slide.



Figure 9: Novell Template Samples



N your market opportunity

- <Current market size>
- <Recent growth or projected growth>
- <Industry, technology or market conditions that create demand for this product/solution and its components>
- <Upgrade or migration opportunities for installed base of x million users>
- <Is Novell first to market?>

Novell.

N qualifying questions

- Is your customer experiencing <problem this product/solution solves>?
- Does your customer need to improve <specific condition this product/solution improves>?
- Does your customer have <an earlier version of this product/solution or a Novell component>?
- Does your customer currently use <a competitor's product/solution>? If so, how satisfied is that customer?
- Does your customer want <this product/solution>?

Novell.

Macromedia Breeze Solution

Novell chose Macromedia Breeze, a complete solution which converts PowerPoint and audio to Flash and enables insertion of quizzes and assessments. The Breeze solution is hosted by Macromedia and provides detailed tracking and reporting within an integrated learning management system. This allows Novell's channel marketing group to roll out product training quickly.

Measurement and Analysis:

With such a large set of resellers, Novell has categorized resellers into levels. High volume resellers are expected to be certified and keep their technical and sales training up to date.

The Novell Rapid E-Learning solution includes tracking and reporting of each course – with reports which show how many learners have registered, completed, and which pages they may have skipped. These reports are critical to Novell to making sure that high volume resellers are certified and trained on new product offerings.

Benefits and Lessons Learned:

Novell found the “rapid e-learning” approach has many benefits.

- ▶ Subject matter experts are now free to develop content independently. Many of the product marketing managers love this – they enjoy ownership of the content and they can work independently.
- ▶ Time to market is greatly enhanced. With the template approach, product managers can develop their content in a few days – from there it typically takes one week or less to complete. Slides and speaker notes are edited for relevance and brevity and then professionally recorded. Result: product training can be launched within a few weeks. The prior process required using either a video provider to create online videos or courseware developers – who are typically backlogged and may not be available for weeks or months.
- ▶ Costs can be saved. The total cost of producing 30 minutes of content is now \$2,000 or less compared to \$10-15,000 and more per course

Case Study - Novell Solution



Novell.



➤ *QuickTrain Modules developed with Macromedia Breeze*

Modules Authored by SMEs	“QuickTrain” Modules – 25 minutes each.
PowerPoint as Authoring Tool	SME’s already have PowerPoint skills Standard Template makes development easy
Easy to Author	SME’s fill in template and write speaker notes
Professional Narration	Professional Narrator creates audio from speaker notes to maximize quality
Hosted Solution	Detailed tracking provided through Macromedia Breeze solution

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Figure 10: Benefits of Breeze Solution

Conclusion: Rapid E-Learning is a Paradigm-Changing Approach

Rapid E-Learning is one of the fastest-growing areas of training and knowledge management. By reducing the time to develop sound instructional content, organizations can communicate and train workers faster than ever.

Most organizations need a mix of e-learning categories to meet all the learning needs. Rapid E-Learning should be used appropriately for time-critical situations that require the transfer of information. Traditional E-Learning should still be used for skills gaps, and Strategic E-learning should be used for organizational change initiatives. By offering and blending all categories of e-learning, a training organization can achieve both short-term and long-term success.

We believe this market will grow quickly for three reasons:

- **New tools to make Self-Paced Rapid E-Learning easy.** Easy to use Self-Paced tools like Macromedia Breeze allow anyone who knows PowerPoint to create an e-learning module within a matter of days, with little or no training. Just like the desktop revolution which put MS Office on the desktop of most professionals, these tools are starting to put e-learning development on the desktops of many professionals.
- **Live collaboration tools are becoming ubiquitous.** Many IT departments are implementing Web communication tools. 60 percent of our survey respondents had access to a Live Rapid E-Learning tool. These tools are available on a per meeting basis and they are becoming the accepted norm for remote visual communication. Those communication methods are extending into accepted practices for teaching and learning.
- **Professionals are buying in.** We often hear complaints that these easy-to-use tools will enable people to proliferate “poorly designed” content. Many training professionals are intimidated by web-based approaches. It is the craftsman who decides how to use the tool to build something of excellence. Once a training manager sees how this approach works they jump in with both feet.

The key to the future of Rapid E-Learning is to use these powerful new tools to create templates, processes, and programs to make good use of these tools. Are we going to enable others to share their knowledge effectively with these tools? We think that's the best approach and hope you agree.

About Us

Bersin & Associates is the only research and consulting firm solely focused on What Works™ e-learning research. With more than 20 years of experience in e-learning, training, and enterprise technology, Bersin & Associates provides a wide range of services including market research, best-practices, vendor and product analysis, corporate workshops, corporate implementation plans and sales and marketing programs. Some of Bersin & Associates innovations include a complete methodology for LMS selection and application usage, an end-to-end architecture and solution for training analytics, and one of the industry's largest research studies on blended learning implementations.

Bersin & Associates offers the industry's first e-learning research subscription, "The E-Learning Research Center," (<http://www.elearningresearch.com>) which offers up-to-date research, product selection guides, whitepapers, and access to other experts online. This service enables corporate training managers, vendors, and consultants make faster, better decisions about e-learning strategy, programs and technology.

Bersin & Associates can be reached at <http://www.berstin.com> or at (510) 654-8500.

About This Research

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The complete study includes additional case studies, discussions of additional tools, and a detailed review of best practices for the processes and methodologies for implementing Rapid E-Learning. If you are considering adopting this powerful approach, we strongly recommend that you purchase the entire study. You can purchase by going to <http://store.berstinassociates.com/relstudy.html>.