

Web Conferencing's Expanding Role in Training

*A Fundamental Paradigm Shift
Gets Underway*



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Alan Greenberg & Andy Nilssen

Wainhouse Research

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Executive Summary

This white paper describes the results of a survey of 533 trainers conducted in December 2006-January 2007 concerning the usage levels, benefits, and justifications for web conferencing as a training application. It explores trainer attitudes concerning the relationship between a variety of synchronous and asynchronous tools, as well as the impact of web conferencing on live, in-person training. Among the key findings:

- While asynchronous tools (e.g., email, online workspaces and labs, and LMS/CMS products), videoconferencing, and audio conferencing were all relatively flat in 2006, *there is an almost direct relationship between the use of web conferencing as a substitute for in-person training*. Use of web conferencing increased 14% in 2006, which directly corresponds to the reduction of 13% stated for in-person training.
- The ability to include learners who could not attend previously is the single greatest impact of web conferencing on training offerings – 63% use web conferencing to reach more learners.
- The ability to save travel costs is the top reason why people use web conferencing for training, with 79% citing this benefit.
- More than half (51%) believe web conferencing is more or just as effective as in-person training, and another 36% believe it is almost as effective. An even greater number (70%) believe web conferencing is more than or just as effective as asynchronous, self-paced training, with another 18% believing it is almost as effective.
- Almost three in five respondents (57%) believe the value returned by web conferencing for training is high (39%) or very high (18%). Only 14% said the value is marginal.
- Ease of use, reputation, customer support, and transparent download and installation all score between *very important* and *extremely important* (between 2.29 – 2.35). These can be viewed as the top criteria for selecting a web conferencing supplier.
- About ¾ of trainers (76%) use the same web conferencing system for both training and general meetings.

The trainers who indicated that web conferencing for training increased 14% while in-person training decreased 13% in 2006 – and the 70% of trainers who believe web conferencing is more than or just as effective as asynchronous tools – are a powerful testament to a fundamental paradigm shift underway in corporate training.

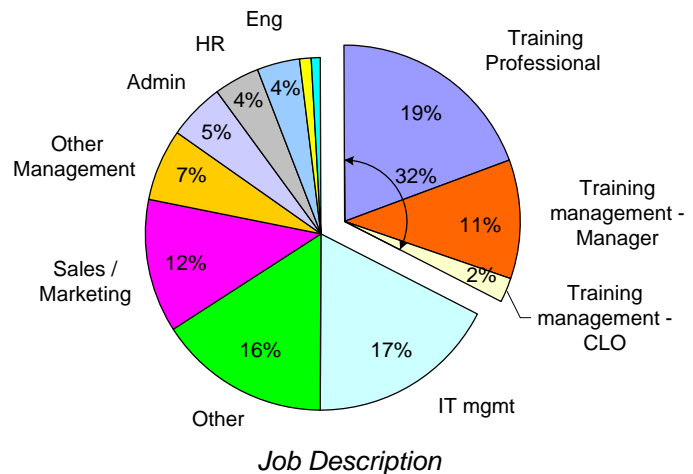
Introduction: How Training Organizations and Growing Businesses Deliver Training

While many a training program has succeeded in accommodating adult learners, certain challenges and inefficiencies have been central to the entire business of delivering training. The cost of delivering training to partners, employees, and customers has been high but perceived as necessary: travel, limited geographic reach, and the challenge of bringing additional subject matter experts into the classroom were obstacles to be overcome. Thus training organizations traditionally have delivered the best possible results “under the circumstances,” often with the distraction of side issues (logistics and cost) that blocked the ability to focus on what was best for both trainers and learners, as well as the entire business.

Methodology and Survey Sample

The goal of this white paper and the research that led to its publication is to understand the usage levels, benefits, and justifications for web conferencing as a training application. In December 2006 through early January 2007 Wainhouse Research invited a group of Citrix and other vendors’ customers to complete an online survey on the use of web conferencing and other technologies for training. Two lists (one provided by Citrix and one purchased from a training publication) were used, containing individuals who had been identified as trainers and educators. Incentives were offered in the form of the chance to win one of 10 amazon.com gift certificates.

About 1/3 of the total respondents (32%) are involved in training management or as training practitioners (broken down below in three groups: training professionals, training managers, or Chief Learning Officers). Another 17% are in IT management and 12% in sales/marketing roles

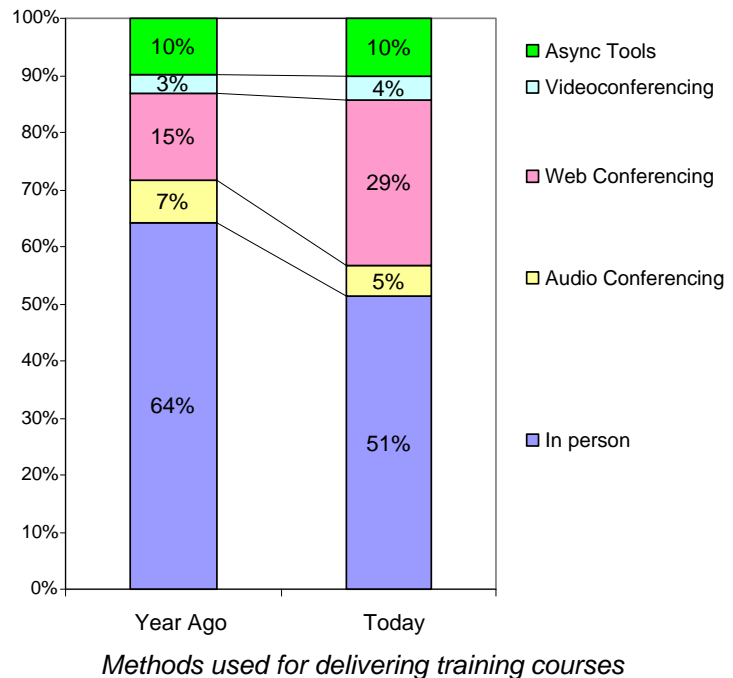


Why Trainers are Turning to Web Conferencing

Web conferencing has been available and in use for many years in the workplace, but the pace of adoption has quickened in recent years. Live web-based events are now seen as a key ingredient of training programs – an ingredient that is beginning to equal the importance of other approaches – and we can now say for certain that it is beginning to displace live training events (as described later in this white paper). Web conferencing also is growing as a supplement to other *asynchronous, time-delayed* technologies and approaches to training, e.g., Learning Management Systems (LMS), audio and video archival systems, etc.

How Have Your Methods for Delivering Training Courses Changed?

We asked respondents how their methods of delivering training courses have changed over the past year. This question is designed to gauge the perceived impact of web conferencing and other technologies on how organizations deliver training, and the results are very clear. While asynchronous tools (e.g., email, online workspaces and labs, and LMS/CMS products), videoconferencing, and audio conferencing are all relatively flat over the past 12 months,¹ *there is an almost direct relationship between the use of web conferencing as a substitute for in-person training.* Web conferencing increased 14% in what was essentially calendar year 2006, which directly corresponds to the reduction of 13% stated for in-person training. This question required respondents to state percentages of usage of each method of delivery (adding up to 100%).



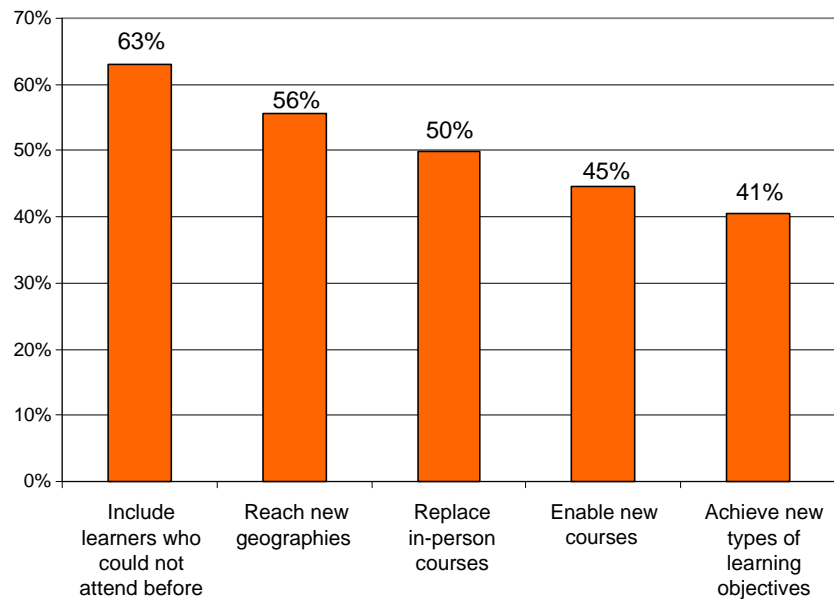
¹ Note that these numbers reflect the target audience of users of web conferencing for training, and not the general population of trainers. They are relatively consistent, however, with WR's own sense of the market and applicability of other tools for training and e-Learning.

How Has Web Conferencing Affected Your Training Offerings?

We also asked how web conferencing has affected training offerings. The goal of this question is to gain a more nuanced assessment of the impact of web conferencing on the missions of training organizations.

The ability to include learners who could not attend previously is the single greatest impact of web conferencing on training offerings – 63% use web conferencing to reach more learners. A total of 56% use

web conferencing to reach geographies not previously reachable. Half (50%) use it to replace in-person courses and almost that many (45%) use it to enable new courses. And 41% use it to achieve new types of learning objectives.



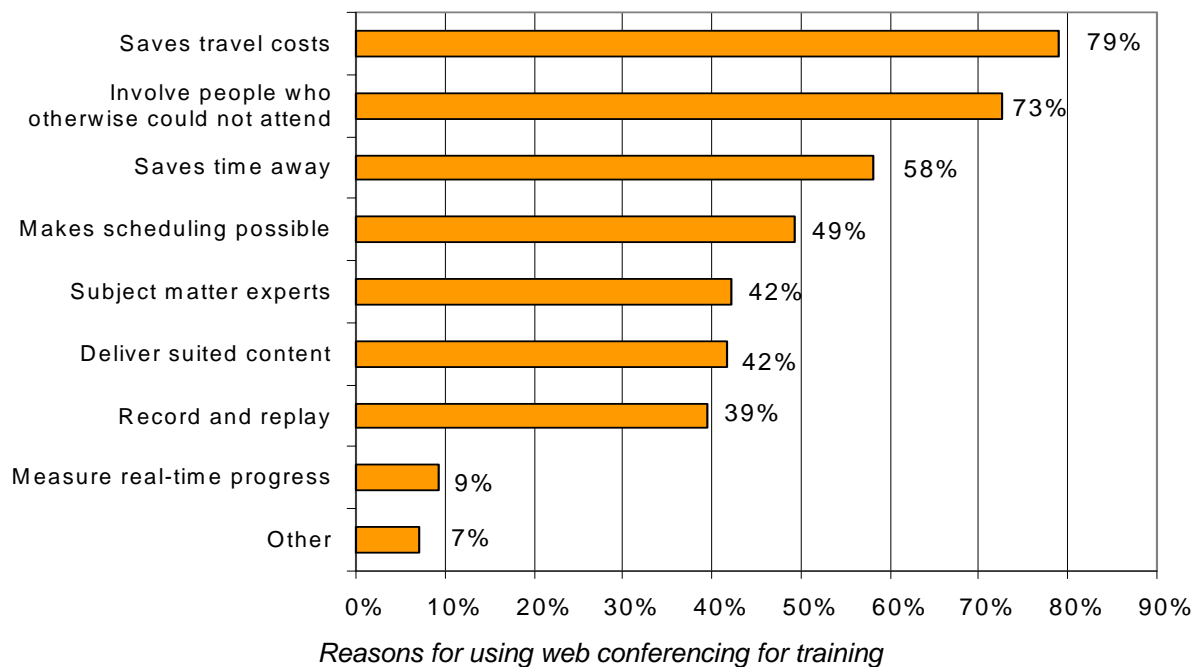
Effect of web conferencing on training offerings

The ability to include new learners or reach new geographies is consistent with an easily-understandable benefit of web conferencing. The fact that almost half use it to enable new courses, and two out of five to achieve new learning objectives, is a particularly significant finding. It is one thing to use technology as an alternative to current practices. It becomes an entirely different story to “go beyond” and use it to find new purposes. Learning organizations are under constant pressure to adapt to changing needs (new products, new policies, new employee training needs) and these numbers suggest that more than 2 out of 5 organizations are using web conferencing to refine and further their missions and approaches.

The Value Derived from Web Conferencing for Training

Those who deliver training may be training and teaching professionals, or may be knowledge workers, consultants, or business owners who formally or informally need to achieve knowledge transfer to others. Both groups share similar needs: value, benefits, the ability to conduct training affordably, and the ability to achieve successful learner outcomes.

Why Do You Use Web Conferencing for Training?



The ability to save travel costs is the top reason why people use web conferencing for training, with 79% citing this benefit. Second is the ability to *reach* people who otherwise could not attend (73%). Saving time from being away from job/home was cited by 58%. This group of the “top three reasons” can be described as universal benefits of web conferencing for training.

Making difficult to schedule sessions possible was cited by 49%. Bringing in subject matter experts and delivering well suited content, were both cited by 42%. The ability to record and replay classes was cited by 39%, and an even smaller number, 9%, use it to measure real-time progress. These are displayed in the following figure.

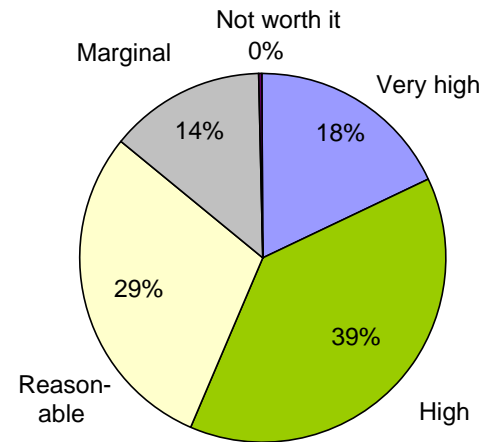
Two questions arise in reviewing these responses: why are certain training-specific benefits lower on the chart, and how does this vary by company size?

Areas like including subject matter experts, delivering suitable content, and record and replay are lower because though they are a growing benefit, they are not common to everyone who trains. Some professional trainers simply do not need to record and replay classes; others do not see content delivery as a challenge.

A small business owner who uses a training session that includes a “sales demo” component to it simply may not need to store content for later delivery. In general, those in larger organizations are more concerned with the appropriateness of content for the web, bringing in subject matter experts, and the reusability of content.

Web Conferencing's Impact on Achieving Training Goals

Almost three in five respondents (57%) believe the value returned by web conferencing for training is high (39%) or very high (18%); another 29% believe it is reasonable. A small group of skeptics exist: about 14% only find marginal value in web conferencing for training.

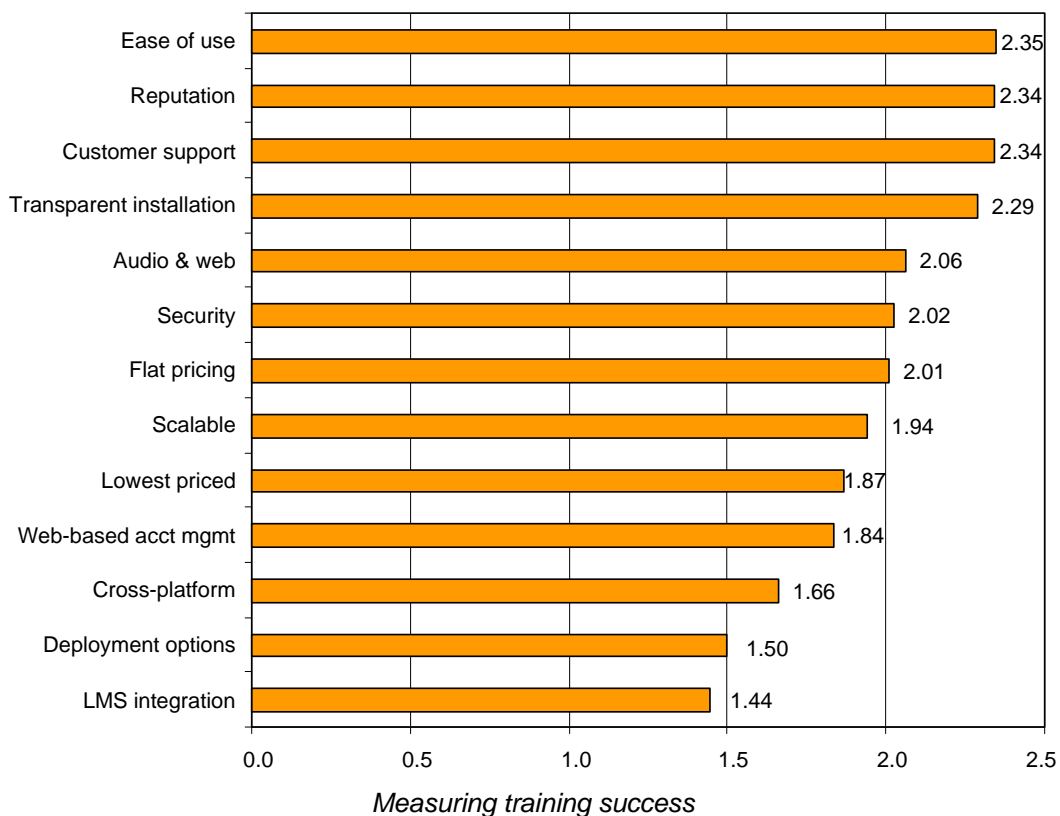


The value returned by web conferencing

Vendor/Platform Selection

What do You Look for in a Supplier?

The traits trainers seek from the suppliers who provide their platforms can be grouped in several "bands" of like traits². Ease of use, reputation, customer support, and transparent download and installation all score between *very important* and *extremely important* (between 2.29 – 2.35). These can be viewed as the top criteria for selecting a web conferencing supplier (and consistent with findings in WR WebMetrics surveys, they apply to all applications).



² 3 = Extremely Important, 2 = Very Important, 1 = Somewhat Important, 0 = Not Important/Don't Know

The next band of traits can best be described as slightly more granular requirements that nonetheless are *very important*: provides both audio and web conferencing, security, and flat pricing (between 2.01 – 2.06). This secondary grouping of traits is key to many trainers. Scalability (supporting large events) remains quite important, scoring 1.94. Being lowest priced and offering web-based account management and reporting are both fairly high in importance (1.87 and 1.84, respectively). Offering cross-platform support (e.g., Windows/Mac/Linux) remains between *somewhat* and *very important*, at 1.66. A choice in deployment options (premise-based or as a hosted software service) and LMS integration are also between *somewhat* and *very important*.

The fact that some of these traits are lower than others does not make them “not important” to trainers. This is because some traits have greater applicability to some trainers based on organization size, type of training content, and whether or not LMS are deployed (which are more typical to larger organizations). Flat pricing and offering the lowest price tends to be less important to large organizations, while large organizations tend to be more interested in security and scalability. Similarly, larger organizations are likely to have the resources to deploy in a variety of fashions, and they indicate a stronger preference for LMS than do smaller organizations. Smaller organizations, on the other hand, tend to be more interested in cross-platform support, because they are more often trying to train customers and partners who may not be standardized on one platform, but instead who may possess disparate platforms.

Closing Thoughts

The trainers who indicated that web conferencing for training increased 14% while in-person training decreased 13% in 2006 – and the 70% of trainers who believe web conferencing is more than or just as effective as asynchronous tools – are a powerful testament to a fundamental paradigm shift underway in corporate training. Neil Rackman’s finding that 87% of learning is lost within 30 days if no follow-on learning activity takes place is a telling statement that points to the value trainers are finding in a truly blended training environment. The reality is that much creativity is being applied to mixing synchronous and asynchronous tools, and over the next few years, trainers will have an even greater array of options and capabilities from which to choose. While today almost 2/3 (63%) of those we surveyed use web conferencing to reach more learners, and 50% to replace in-person courses, it is likely that those numbers will be even higher by 2010. Similarly, while more than 2 out of 5 organizations use web conferencing to achieve new types of learning objectives, that ratio no doubt will be higher as web conferencing continues to find new adopters and new training applications.

About the Authors

Andy Nilssen is a Senior Analyst & Partner at Wainhouse Research, where he is a consultant to rich media conferencing vendors, network infrastructure vendors, end users, government agencies, end users, and venture capitalists. Andy is a co-author of WR's annual three volume series *Rich Media Conferencing*, the firm's thorough analysis of the conferencing industry. Earlier in his career, Andy managed the planning and launching of PictureTel's Venue and Concorde group videoconferencing systems. Andy has over 25 years of experience in high-technology product marketing and market research, earned his MBA and BSEE degrees from the University of New Hampshire, and holds two ease-of-use related patents. He can be reached at andyn@wainhouse.com

Alan Greenberg is a Senior Analyst & Partner at Wainhouse Research. Alan has worked in the telecommunications, videoconferencing, software and services, and multimedia arenas for more than 20 years, holding marketing positions with VTEL, Texas Instruments, and several Austin, Texas-based startups. He has conducted research into dozens of distance learning and e-Learning products and programs and covers managed services, 3G wireless conferencing, and management software for WR. He is co-lead analyst on the Wainhouse Research WebMetrics research program, and has authored many research notes on web conferencing and e-Learning vendors at www.wrplatinum.com. Alan holds an M.A. from the University of Texas at Austin and a B.A. from Hampshire College. He can be reached at agreenberg@wainhouse.com.

About Wainhouse Research

Wainhouse Research, www.wainhouse.com, is an independent market research firm that focuses on critical issues in the Unified Communications and rich media conferencing fields. The company conducts multi-client and custom research studies, consults with end users on key implementation issues, publishes white papers and market statistics, and delivers public and private seminars as well as speaker presentations at industry group meetings. Wainhouse Research publishes a variety of reports that cover the all aspects of rich media conferencing, and the free newsletter, *The Wainhouse Research Bulletin*.

About Citrix Online

Citrix Online, a division of Citrix Systems, Inc. (Nasdaq: CTXS), is a leading provider of easy-to-use, on-demand applications for remote desktop access, Web conferencing and collaboration. Its "Simpler Is Better" approach to empowering business productivity online offers small and mid-sized businesses, consumers and professionals an easier, more cost-effective and secure way to access and interact with information, customers, partners and employees in real time. Citrix Online's award-winning services, which are used by more than 20,000 businesses and hundreds of thousands of individual subscribers, include: Citrix® GoToMyPC® for easy, secure remote PC access from anywhere; Citrix® GoToAssist™ for live, easy remote support; Citrix® GoToMeeting™ for online meetings made easy; and Citrix® GoToWebinar™ the industry's first do-it-yourself solution for Web events. Based in Santa Barbara, California, Citrix Online has satellite offices and data centers distributed around the world. For more information, please visit www.citrixonline.com.