**THE ELEARNING GUILD**

*Research Report / June 2004*

# Report on Trends in Organizational Practices of Synchronous e-Learning

ANALYSIS AND COMMENTARY BY JOE PULICHINO

According to the latest Gartner "Learning Hype Cycle," virtual classrooms and collaboration tools are reaching a significant point of market adoption and product maturity. This finding is well supported by the results of our recent survey on Trends in Organizational Practice of Synchronous e-Learning. More and more organizations are offering synchronous e-Learning events and programs to their employees, customers, vendors, and partners. More training programs include synchronous e-Learning components and more synchronous e-Learning programs are fee-based. It appears that the day of synchronous e-Learning has arrived.

The Guild has been conducting surveys on Synchronous e-Learning for three years. Our first, The Synchronous Online Learning Technology Survey, was published in the summer of 2001, and was followed by The Synchronous e-Learning Survey in August 2002. Guild Members can access both of these in the Guild Research section on the The eLearning Guild Web site, and use them to benchmark this year's results.

This year we had so many questions in mind that we decided to conduct two separate surveys on the subject of Synchronous e-Learning: *Trends in Organizational Practice* and *Experiences and Preferences of Learners*. We built on many of the same questions asked in the previous surveys, but also expanded our line of inquiry. This report on Trends in Organizational Practice examines how our respondents' organizations are doing synchronous e-Learning.
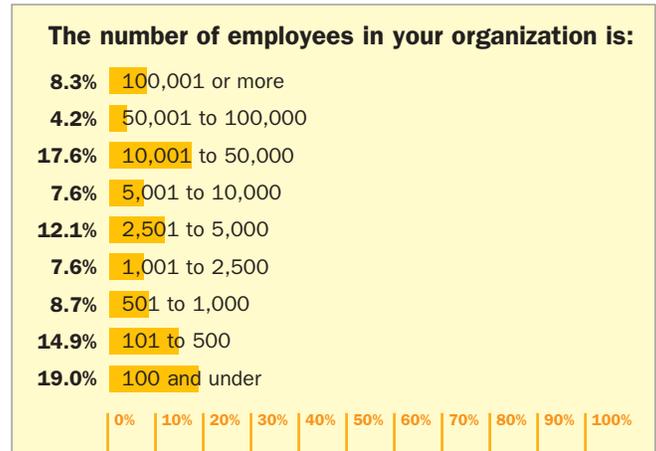
**Page Guide to the Survey**

**2**   **Questions 1 & 2**
Our respondents are mostly managers, designers, and developers from companies of all sizes

**3**   **Question 3**
The adoption rate for synchronous e-Learning is increasing significantly

**4**   **Question 4**
The most popular audience for synchronous e-Learning is employees

**5**   **Question 5**
More and more learners are paying a fee for synchronous e-Learning

**6**   **Question 6**
Single event e-Learning courses are the most common form of synchronous e-learning

    **Question 7**
**6**   Technical training and product knowledge lead the list of subject areas

    **Question 8**
**7**   WebEx and Centra are the top two most often used technology platforms for delivery of synchronous e-Learning among our respondents

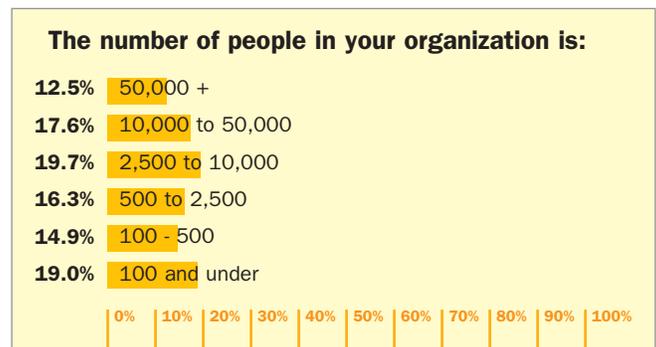## Questions 1 & 2: **The Survey Respondents and Size of Their Organizations**

**Question 1: The survey respondents were primarily managers and designer/developers.**

**Your role in your organization is:**

| | |
|---|---|
| 45.0% | Management |
| 18.3% | Designer |
| 17.0% | Developer |
| 10.4% | Instructor/Teacher |
| 1.7% | Subject Matter Expert |
| 1.0% | Learner (end-user) |
| 6.6% | Other "All of the above" |

0%  10%  20%  30%  40%  50%  60%  70%  80%  90%  100%

**Question 2: The sizes of the respondents' organizations were fairly evenly distributed.**

**The number of employees in your organization is:**

| | |
|---|---|
| 8.3% | 100,001 or more |
| 4.2% | 50,001 to 100,000 |
| 17.6% | 10,001 to 50,000 |
| 7.6% | 5,001 to 10,000 |
| 12.1% | 2,501 to 5,000 |
| 7.6% | 1,001 to 2,500 |
| 8.7% | 501 to 1,000 |
| 14.9% | 101 to 500 |
| 19.0% | 100 and under |

0%  10%  20%  30%  40%  50%  60%  70%  80%  90%  100%

*For the purpose of our analysis, and to create a more even distribution and a larger sample within each group, we aggregated the original nine groups into six groups as follows:*

**The number of people in your organization is:**

| | |
|---|---|
| 12.5% | 50,000 + |
| 17.6% | 10,000 to 50,000 |
| 19.7% | 2,500 to 10,000 |
| 16.3% | 500 to 2,500 |
| 14.9% | 100 - 500 |
| 19.0% | 100 and under |

0%  10%  20%  30%  40%  50%  60%  70%  80%  90%  100%

## Question 3: Does Your Organization Currently Deliver Synchronous e-Learning?

### Commentary

Over the past two years we have seen a significant increase in the percentage of respondents who report that their organizations are currently delivering synchronous e-Learning.

In the July-August 2002 survey, 60% of the respondents reported that their organizations were currently delivering synchronous e-Learning. That number has now jumped to 73%, an increase of 22% in the synchronous e-Learning adoption rate across organizations of all sizes.

**2002**
**Does your organization currently deliver synchronous e-Learning?**

- 59.9% Yes
- 39.5% No

39.5%   59.9%

**2004**
**Does your organization currently deliver synchronous e-Learning?**

- 73.4% Yes
- 26.6% No

26.6%   73.4%
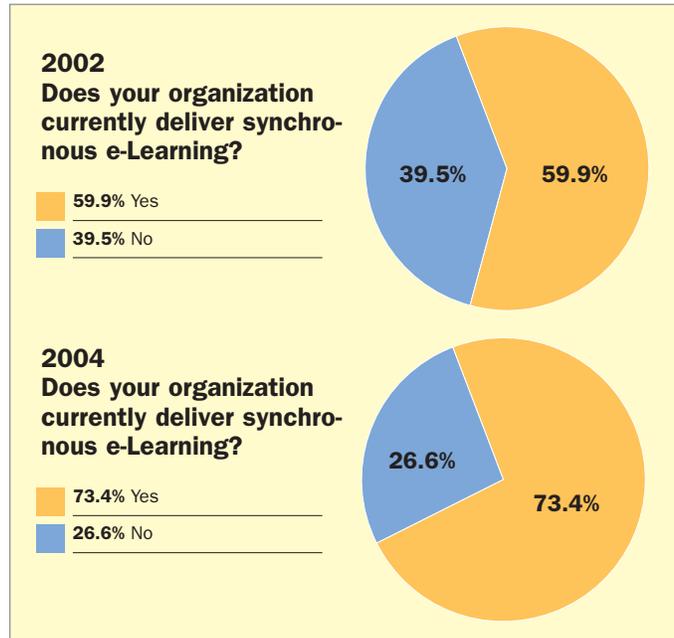
### The bigger the organization, the higher the adoption rate for synchronous e-Learning

When we looked more closely at the delivery frequency of synchronous e-Learning by organizational size, we found generally that the larger the organization, the more likely it was to deliver synchronous e-Learning. Although adoption is 60% for small businesses of fewer than 100 employees, the rate increases with the size of the organization, culminating in 83% adoption for enterprises with more than 50,000 employees. Why is this so? Perhaps because larger organizations tend to have more geographically dispersed employee populations and therefore synchronous e-Learning provides a valuable benefit by linking learners and instructors regardless of distance.

**50,000 or more**
- 83.3% Yes
- 17.7% No

No / Yes

**10,000 to 50,000**
- 78.4% Yes
- 21.6% No

No / Yes

**2,501 to 10,000**
- 80.7% Yes
- 19.3% No

No / Yes

**501 to 2,500**
- 68.1% Yes
- 31.9% No

No / Yes

**101 to 500**
- 72.1% Yes
- 27.9% No

No / Yes

**Under 100**
- 60% Yes
- 40% No

No / Yes

**Total**
- 73.4% Yes
- 26.6% No

No / Yes

## Question 4: To Whom Does Your Organization Deliver Synchronous e-Learning?

### Commentary

This year's survey began tracking the audiences to which the respondents' organizations deliver synchronous e-Learning. Among the respondents whose organizations are currently delivering synchronous e-Learning, we found that 79% deliver to employees. The frequencies drop dramatically for the other audiences.
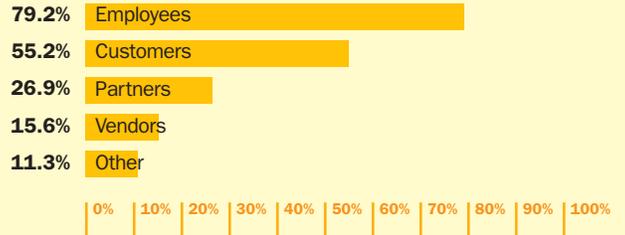
### Commentary

We also wanted to see if there was any significant difference in the mix of audiences based on the size of the organization. It turns out there was, especially when it came to employees and customers. Interestingly, the larger the organization the more likely that it delivers synchronous e-Learning to its employees, yet the smaller the organization, the more likely that it delivers synchronous e-Learning to its customers. 100% of Plus 50,001 sized companies use synchronous e-Learning for their employees versus 55% for the Under 100 sized companies. Yet, 76% of the Under 100 sized organizations use synchronous e-Learning for their customers versus only 37% for the Plus 50,001 sized companies.

Why? Perhaps because the smaller companies have fewer employees in fewer places, yet still have many customers in many different locations, and this ratio requires stretching their education delivery resources with synchronous e-Learning. The lesson: synchronous learning gives learning more reach.

The result for partners and vendors was more evenly mixed, but here too the Under 100 sized group was more likely to deliver synchronous e-Learning to their partners and vendors.
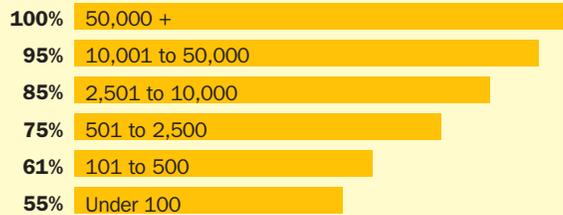
This chart shows the percentage of respondents who reported that their organizations deliver synchronous e-Learning to the various audiences.

**If you responded "Yes" to Question 3, to which audiences does your audience currently deliver synchronous e-Learning? (Check all that apply)**

| | % |
|---|---|
| Employees | 79.2% |
| Customers | 55.2% |
| Partners | 26.9% |
| Vendors | 15.6% |
| Other | 11.3% |

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

**Percentage of respondents who reported that their organizations deliver synchronous e-Learning to these various audiences:**

**Employees**

| | % |
|---|---|
| 50,000 + | 100% |
| 10,001 to 50,000 | 95% |
| 2,501 to 10,000 | 85% |
| 501 to 2,500 | 75% |
| 101 to 500 | 61% |
| Under 100 | 55% |

**Customers**

| | % |
|---|---|
| 50,000 + | 37% |
| 10,001 to 50,000 | 43% |
| 2,501 to 10,000 | 43% |
| 501 to 2,500 | 66% |
| 101 to 500 | 61% |
| Under 100 | 76% |

**Partners**

| | % |
|---|---|
| 50,000 + | 30% |
| 10,001 to 50,000 | 18% |
| 2,501 to 10,000 | 30% |
| 501 to 2,500 | 16% |
| 101 to 500 | 29% |
| Under 100 | 39% |

**Vendors**

| | % |
|---|---|
| 50,000 + | 17% |
| 10,001 to 50,000 | 18% |
| 2,501 to 10,000 | 17% |
| 501 to 2,500 | 6% |
| 101 to 500 | 10% |
| Under 100 | 24% |

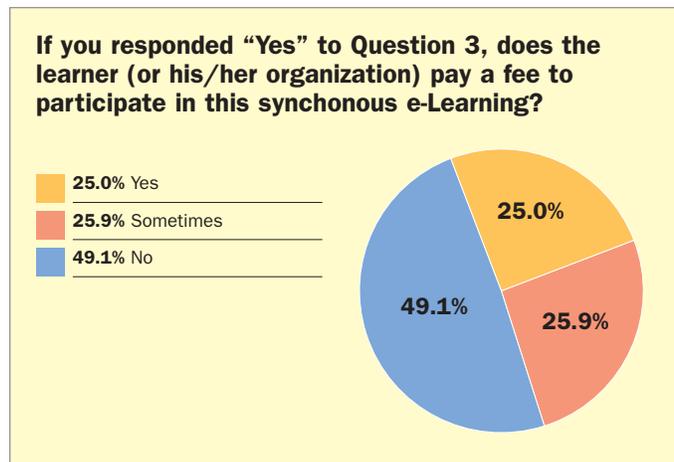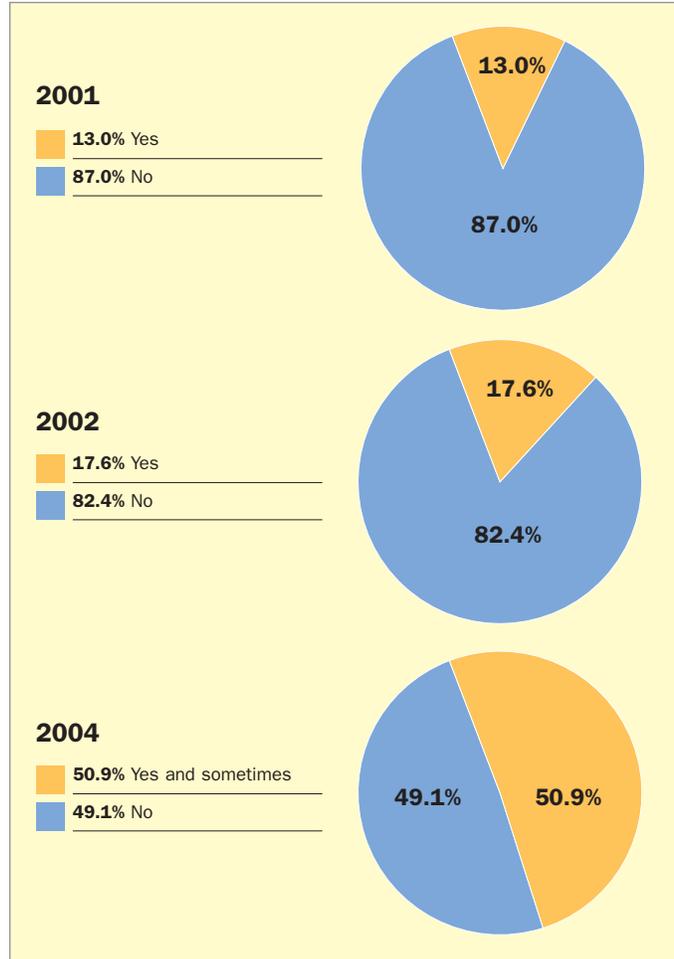0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

## Question 5: Does the Learner (or His or Her Organization) Pay a Fee to Participate in Synchronous e-Learning?

### Commentary

In 2001 we began asking survey respondents whether they charged fees for synchronous e-Learning, and we now have data from this question over all three surveys.

We believed that as synchronous e-Learning became more available, it would tend to become more fee-based. New technologies are often free until they have proven their functionality and value. This seems to be the case with synchronous e-Learning — the more it is adopted, the greater the frequency of fees for the learners.

This year we qualified our question by adding a "sometimes" choice because we felt that it would not necessarily be one way or the other, all the time. For purposes of comparison over the years, however, we have included the "sometimes" with the "yes" answers.

**2001**
- **13.0%** Yes
- **87.0%** No

13.0%
87.0%

**2002**
- **17.6%** Yes
- **82.4%** No

17.6%
82.4%

**2004**
- **50.9%** Yes and sometimes
- **49.1%** No

49.1%
50.9%

**If you responded "Yes" to Question 3, does the learner (or his/her organization) pay a fee to participate in this synchonous e-Learning?**

- **25.0%** Yes
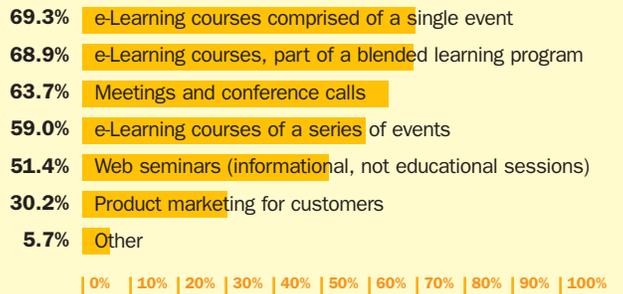- **25.9%** Sometimes
- **49.1%** No

25.0%
25.9%
49.1%

## Question 6: Which Forms of Synchronous e-Learning Does Your Organization Deliver?

### Commentary

We have not asked this question in previous surveys. Perhaps this was because we were not as clear about these various forms only a few years ago. As we designed this survey, we found that we had to work out what we really meant by synchronous e-Learning. We came up with the several forms found in this question. So, we thought we would ask which forms of e-Learning were most often delivered.

We were actually expecting that web seminars (webinars) would be the most popular form, but both stand-alone and blended e-Learning courses topped the list at 69% frequency. Considering that trend, there must be some new and interesting design and development work going on to build courseware for this relatively new form of delivering educational content.

**If you answered "Yes" to Question 3, which forms of synchronous e-Learning does your organization deliver (Select all that apply)**

| | |
|---|---|
| 69.3% | e-Learning courses comprised of a single event |
| 68.9% | e-Learning courses, part of a blended learning program |
| 63.7% | Meetings and conference calls |
| 59.0% | e-Learning courses of a series of events |
| 51.4% | Web seminars (informational, not educational sessions) |
| 30.2% | Product marketing for customers |
| 5.7% | Other |

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

## Questions 7: In What Subject Areas Does Your Organization Deliver Via Synchronous e-Learning?

### Commentary

There seems to be a significant gap in frequency between the "hard" and "soft" subject areas, and now that we asked this question we are left wondering:

Is this list a reflection of the most popular training subjects no matter what the delivery mode? Or, does this list tell us that there are subject areas more suited for synchronous e-Learning than others?

What do you think? We will cross reference this data with that of other surveys we have conducted and will explore this line of inquiry in future surveys.

**If you answered "Yes" to Question 3, in what subject areas does your organization deliver via synchronous e-Learning? (Select all that apply)**

| | |
|---|---|
| 79.2% | Applications and/or technical training |
| 63.7% | Product knowledge |
| 42.9% | Management and leadership |
| 38.7% | Business skills |
| 30.2% | Soft skills |
| 14.2% | Other |

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

## Question 8: Which Technology Platform Has Your Organization Used for Delivery of Synchronous e-Learning?
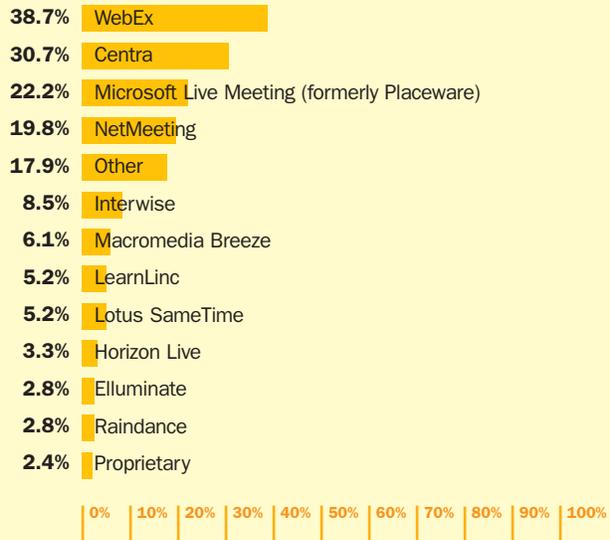
### Commentary

In 2001 and 2002, we asked the survey respondents which synchronous learning systems they had used to participate in an e-Learning course for their own learning in the three months prior to taking the survey. We asked a similar questions in this year's Synchronous e-Learning Survey: Experiences and Preferences of Learners and the results and trends have been reported in that commentary and analysis.

Question 8 of this survey, however, is a different question as it asks which technology platforms their organizations have used, as opposed to which platforms they, as participants, have used.

It seems that WebEx has done a good job of extending its product beyond the web meeting market and into the e-Learning market, just as it seems that Centra is a steady leader among the e-Learning, virtual classroom vendors. Please do refer to the report on Experiences and Preferences for more data on the use and value of the specific technology platforms.

**If you answered "Yes" to Question 3, which technology platforms has your organization used for delivery of synchronous e-Learning? (Check all that apply)**

| Percent | Platform |
|---|---|
| 38.7% | WebEx |
| 30.7% | Centra |
| 22.2% | Microsoft Live Meeting (formerly Placeware) |
| 19.8% | NetMeeting |
| 17.9% | Other |
| 8.5% | Interwise |
| 6.1% | Macromedia Breeze |
| 5.2% | LearnLinc |
| 5.2% | Lotus SameTime |
| 3.3% | Horizon Live |
| 2.8% | Elluminate |
| 2.8% | Raindance |
| 2.4% | Proprietary |

0% | 10% | 20% | 30% | 40% | 50% | 60% | 70% | 80% | 90% | 100%

## About the author

### Joe Pulichino, Director of Research, The eLearning Guild

Joe Pulichino began his career in education as an English instructor at Rutgers University over 25 years ago. Since then he has held a number of senior management positions in the technology sector where he was responsible for the development, delivery, and marketing of a wide range of corporate education programs and services. Most recently he has served as vice-president of education services at Sybase, vice-president of eLearning at Global Knowledge Network, and CEO of EduPoint. He is an adjunct faculty member of the Pepperdine University Graduate School of Education and Psychology where he is completing his Ed.D. in Education Technology. The focus of his research is on informal and organizational learning. Joe is principal of the Athena Learning Group, a virtual network of consultants and academics working in the fields of learning, knowledge management, performance enhancement and Communities of Practice.

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## To learn more about this subject

To learn more about synchronous e-Learning tools, technologies, and practices, we encourage you to search the following pages on the Guild's Web site using the terms: synchronous e-Learning.

**The Resource Directory:** http://www.eLearningGuild.com/resources/resources/index.cfm?action=viewcats

**The eLearning Developers' Journal:** http://www.eLearningGuild.com/articles/abstracts/index.cfm?action=view

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Guild members represent a diverse group of instructional designers, content developers, web developers, project managers, contractors, consultants, managers and directors of training and learning services – all of whom share a common interest in e-Learning design, development, and management. Members work for organizations in the corporate, government, academic, and K-12 sectors. They also are employees of e-Learning product and service providers, consultants, students, and self-employed professionals.

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