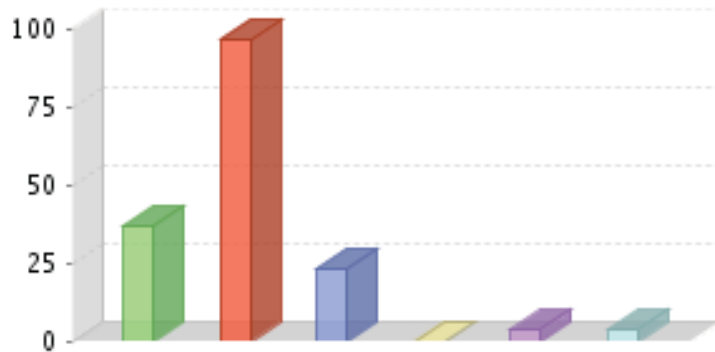


CEdMA Europe Pulse of the Industry 1005 plus Routes to Market

1. General Company Demographics

Which of the following describes your company's business?
Please choose all that apply.



1 - Hardware	36.67% (11)	2 - Software	96.67% (29)
3 - Software as a Service (SaaS)	23.33% (7)	4 - Biosciences	0% (0)
5 - Non-profit	3.33% (1)	6 - Other	3.33% (1)

Response: 30

2. What was your company's worldwide annual revenue in 2009, or most recent fiscal year?



1 - \$100M or less	13.33% (4)	2 - Between \$101M and \$500M	13.33% (4)
3 - Between \$501M and \$1B	13.33% (4)	4 - More than \$1B and less than \$3B	30% (9)
5 - \$3B or more	30% (9)		

Mean: 3.5

Response: 30

3. How many full-time employees does your company have worldwide?



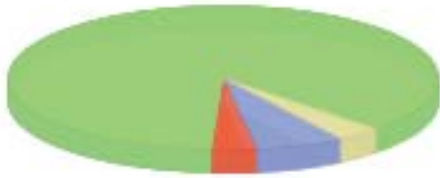
1 - Less than 100	3.33% (1)	2 - 101 to 1,000	13.33% (4)
3 - 1,001 to 5,000	30% (9)	4 - 5,001 to 10,000	23.33% (7)
5 - 10,001 to 50,000	13.33% (4)	6 - More than 50,000	16.67% (5)

Mean: 3.8

Response: 30

4. Your Education Organisation (in your chosen geography)

Which of the following best describes your education organization's primary business model?



1 - Profit Center (expectation is to make a profit - may have a margin target to achieve)	86.67% (26)	2 - Cost Recovery (expectation is to sell enough training to at least break even on expenses)	3.33% (1)
3 - Cost Center (expectation is to provide non-education revenue benefits - for example better trained employees and partners)	6.67% (2)	4 - Other	3.33% (1)

Mean: 1.27

Response: 30

5. What were your education organization's annual revenues in 2009, or most recent fiscal year in your chosen geography?

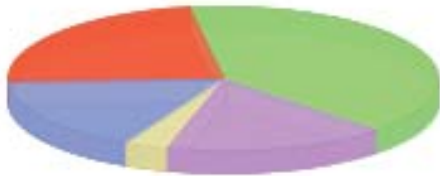


1 - No revenue	0% (0)	2 - Less than \$500K	10.34% (3)
3 - \$500K but less than \$1M	6.9% (2)	4 - \$1M but less than \$3M	17.24% (5)
5 - \$3M but less than \$5M	6.9% (2)	6 - \$5M but less than \$10M	20.69% (6)
7 - \$10M but less than \$25M	13.79% (4)	8 - \$25M or more	24.14% (7)

Mean: 5.59

Response: 29

6. What was your education organization's headcount in 2009, or most recent fiscal year, in your chosen geography?

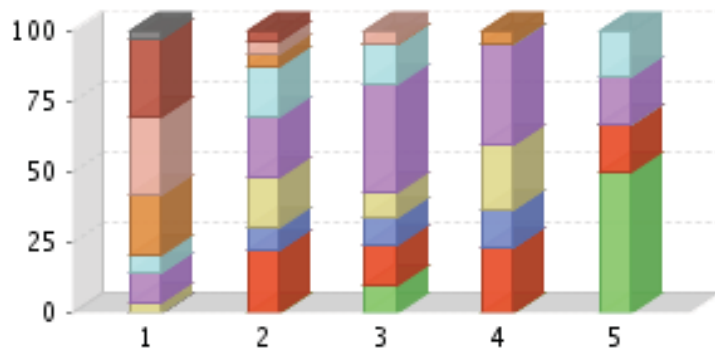


1 - Less than 10	40% (12)	2 - 11-20	23.33% (7)
3 - 21-50	16.67% (5)	4 - 51-100	3.33% (1)
5 - More than 100	16.67% (5)		

Mean: 2.33

Response: 30

7. What percentage of students trained by your organization are the following, in your chosen geography:

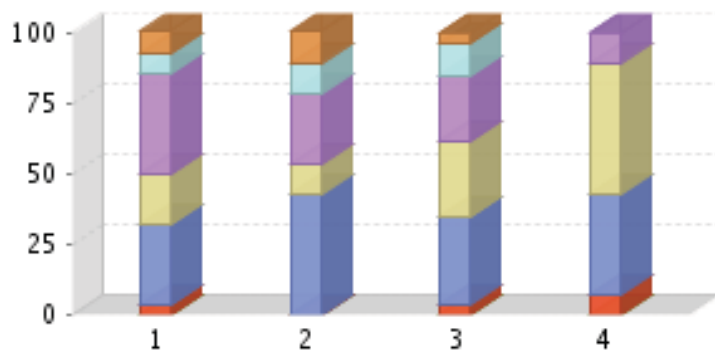


	0%	1-2%	3-5%	6-10%	11-20%	21-40%	41-60%	61-80%	81-99%	100%	Mean
1 Customers	0% (0)	0% (0)	0% (0)	3.45% (1)	10.34% (3)	6.9% (2)	20.69% (6)	27.59% (8)	27.59% (8)	3.45% (1)	7.55
2 Business Partners	0% (0)	21.74% (5)	8.7% (2)	17.39% (4)	21.74% (5)	17.39% (4)	4.35% (1)	4.35% (1)	4.35% (1)	0% (0)	4.57
3 Resellers	9.52% (2)	14.29% (3)	9.52% (2)	9.52% (2)	38.1% (8)	14.29% (3)	0% (0)	4.76% (1)	0% (0)	0% (0)	4.19
4 Employees	0% (0)	22.73% (5)	13.64% (3)	22.73% (5)	36.36% (8)	0% (0)	4.55% (1)	0% (0)	0% (0)	0% (0)	3.91
5 Other	50% (3)	16.67% (1)	0% (0)	0% (0)	16.67% (1)	16.67% (1)	0% (0)	0% (0)	0% (0)	0% (0)	2.67

Response: 29

8. The Change from 2009 to 2010

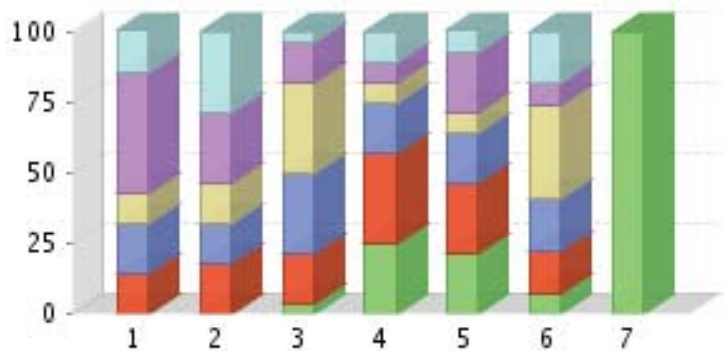
What percentage of change has your education organization seen from 2009 into 2010 in the following measures?



	<-40%	-40% to -20%	-20% to 0%	0% (flat)	0% to +10%	+10% to +20%	>+20%	Mean
1 Students trained	0% (0)	3.57% (1)	28.57% (8)	17.86% (5)	35.71% (10)	7.14% (2)	7.14% (2)	4.36
2 Revenue	0% (0)	0% (0)	42.86% (12)	10.71% (3)	25% (7)	10.71% (3)	10.71% (3)	4.36
3 Margin	0% (0)	3.85% (1)	30.77% (8)	26.92% (7)	23.08% (6)	11.54% (3)	3.85% (1)	4.19
4 Headcount	0% (0)	7.14% (2)	35.71% (10)	46.43% (13)	10.71% (3)	0% (0)	0% (0)	3.61

Response: 28

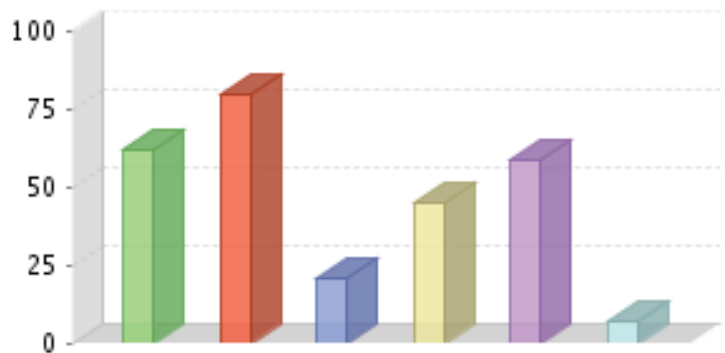
9. Please assess the following potential issues in the range 0 for no issue, 1 for minor issue, up to 5 for severe issue.



	0 = no issue	1 = minor issue	2	3	4	5 = serious issue	Mean
1 Customer/Partner has no/limited training budget	0% (0)	14.29% (4)	17.86% (5)	10.71% (3)	42.86% (12)	14.29% (4)	4.25
2 Student travel time/costs	0% (0)	17.86% (5)	14.29% (4)	14.29% (4)	25% (7)	28.57% (8)	4.32
3 Customer/Partner has no time for training	3.57% (1)	17.86% (5)	28.57% (8)	32.14% (9)	14.29% (4)	3.57% (1)	3.46
4 Our Development/delivery resource	25% (7)	32.14% (9)	17.86% (5)	7.14% (2)	7.14% (2)	10.71% (3)	2.71
5 Lack of executive management support for training as part of our company's strategy	21.43% (6)	25% (7)	17.86% (5)	7.14% (2)	21.43% (6)	7.14% (2)	3.04
6 Pricing pressure on training - including attempts to give away training	7.41% (2)	14.81% (4)	18.52% (5)	33.33% (9)	7.41% (2)	18.52% (5)	3.74
7 Other	100% (1)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	1

Response: 28

10. Which of the following actions have you taken over the last 9-12 months to improve the situation?



1 - More e-Learning	62.07% (18)	2 - More onsite/customized events	79.31% (23)
3 - Training funded via products	20.69% (6)	4 - Development/delivery cost reduction	44.83% (13)
5 - More marketing/sales activity	58.62% (17)	6 - Other	6.9% (2)

Response: 29

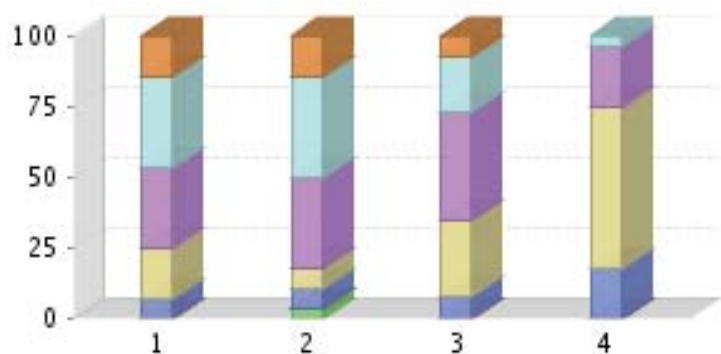
11. What have been your most successful solutions in 2009 and 2010?

- More strategic buyin for training from top management. More focus on selling training. new course catalog
- Customized training services on big accounts
Royalties from Education Partners on classes (delivered by Partners using our training materials) for midsize accounts
- The combination of WBT+ILT plus use of repeatable lab platform globally
- more on site and custom classes
- Motivating the sales organisation by SPIFF and pressure.
Education by mentoring.
Education Credit business model.

- 6 Student Giveaways
- 7 end user desktop rollouts
- 8 Introduction of NCT for internal staff. Huge issue for us as we have a lot of office with few staff in each.
- 9 appointment of fulfillment center partners to help manage the business
outsourcing courseware development to 3rd party independent vendors
- 10 Paper based marketing. Posting out catalogs and flyers still appears to have the best effect.
- 11 Having a dedicated Training Sales rep
- 12 - specialized and targeted promotions
- introduced a Training overlay sales rep - BIG success since working very focused
- 13 Project based Education (customised)
- 14 Adjusting online course style.
e-shots offering early bird deals
- 15 reducing the number of obscure courses being scheduled which allows more focus on improved delivery of core courses and reduces costs
- 16 We have placed a very high priority on attachment to all software deals. In addition we now pay 100% commission on training in order to back this up.
- 17 focus on on site, custom delivery
- 18 Virtual delivery sessions with hands on activities
- 19 Virtual Live Classrooms and eAcademies
- 20 Building remote delivery systems for both Remote ILT with instructor present and Virtual courses
- 21 Good old fashioned classroom delivery
- 22 Live Virtual Classroom delivery. Unlimited LVC program.
- 23 Focus on lead generation and getting close to customers when marketing to them
Focus on revenue protection rather than cost reduction to maintain margin
Building a leveraged sales and delivery model with a training partner community

12. Moving into for 2010

What percentage of change is your education organization expecting to see in FY 2010 in the following measures?



	<-40%	-40% to -20%	-20% to 0%	0% (flat)	0% to +10%	+10% to +20%	>+20%	Mean
1 Students trained	0% (0)	0% (0)	7.14% (2)	17.86% (5)	28.57% (8)	32.14% (9)	14.29% (4)	5.29
2 Revenue	3.57% (1)	0% (0)	7.14% (2)	7.14% (2)	32.14% (9)	35.71% (10)	14.29% (4)	5.29
3 Margin	0% (0)	0% (0)	7.69% (2)	26.92% (7)	38.46% (10)	19.23% (5)	7.69% (2)	4.92
4 Headcount	0% (0)	0% (0)	17.86% (5)	57.14% (16)	21.43% (6)	3.57% (1)	0% (0)	4.11

Response: 28

13. What are your major challenges, moving through 2010?

- 1 get existing LMS to support our business. Streamlining process and procedures around training
- 2 - To deliver more customized training services and classes on big accounts (challenge=resources for delivery and awareness/prospection)
- elearning / blended learning adoption from Partners
- 3 increased business, zero budget, lower headcount and poor executive backing
- 4 rebuild public classes
- 5 Getting all sales promoting the education offerings
- 6 Economic recover
Budget allocation to training
travel / time investment

7	Driving the business through the process of being acquired
8	sales force focus
9	on boarding fulfillment partners promoting totally new lines of courseware increasing focus on academic rather than commercial training recognising online learning programs within a training center network marketing certification
10	Increasing the number of students on public courses. There has been a switch to on site events which takes more administration, more time, more pressure on Instructors. Working with fewer resources.
11	Growth over 2009 in a climate of an integration project. Increasing Onsite/Custom class pipeline in various geographies
12	- getting more attention with internal sales - make partners and resellers sell more pro-actively
13	Drop in Public Schedule business
14	maintaining/increasing revenue whilst addressing change in customer requirements
15	doing even more with even less. higher margin requirements
16	position certification with clear value and benefits for Employers and end-customers
17	A major emphasis on Revenue and margin (profitability) and some very challenging targets to go with this.
18	long sales cycle for software, so uptake in new customers sales will be end of year earliest
19	Getting understanding of 'value' not only in cost savings terms but in increased take aways and learning outcomes from students.
20	travel and training budget, modularization of content and enabement of multi-modal delivery formats
21	Ensuring training is tied to real business problems - then people will attend Growing requirements with flat headcount
22	Budgets
23	1) Managing business mix between channel partners 2) Introducing new certifications 3) Ramping up 'distance learning' without canibalising exisiting business
24	Integrating aquisitions and developing a customer/partner strategy than facilitates ongoing training. Increase revenue Increase margin Align to other LOB's
25	Selling training

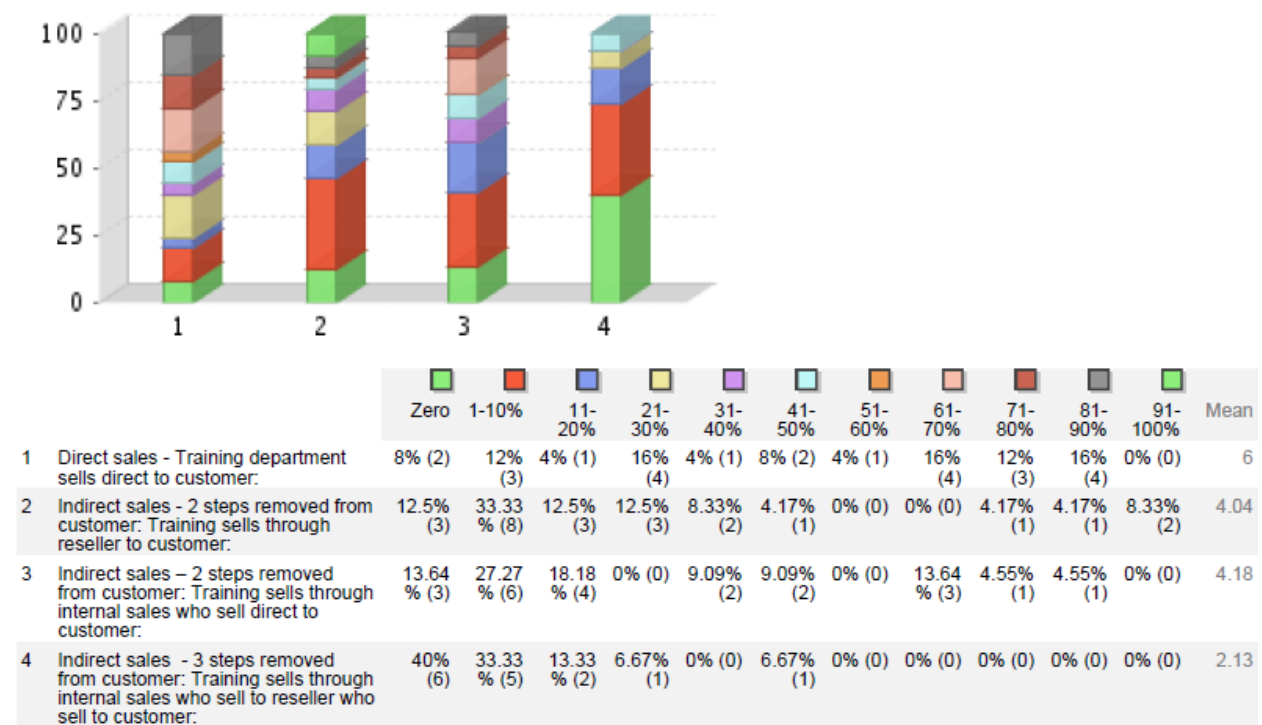
14. What major initiatives are you taking during 2010?

1	More marketing around training and new public website. possible Migrating from existing LMS
2	- Customized services & Classes promotion / lead generation activities on big accounts for DS and on Midsize accounts for Partners - eLearning promotion / lead generation activities
3	a new look at developing courseware coupled with "developer" recordings and new community sites
4	selling to new customers/projects
5	implementing an e learning system implementing a ip purchase business model
6	Marketing detailed business planning and analysis with learning partners Value based learning partner program non-authorized training strategy
7	Focus is business integration into new organisation
8	attaching training to relevant sales motions
9	outsourcing to fulfillment partners reduce development costs by recognising 3rd party courseware
10	Push on "Learning", "Performance" and "Development" rather than simple "Course Attendance" or "Training". Ongoing interaction with Learners post-course to extend the relationship to a second, third etc. course attendance.
11	Targeted marketing to the academic market Increase Training sales capabilities in other countries Sales incentive on a Qtrly basis.
12	- launch of a new major software release, therefore will have re-structured and new curriculum - more targeted promotions - adding more value into our trainings in order to better differentiate from grey market
13	Integration & attach with Services & License
14	more marketing new style online courses blended learning options
15	refocus on convincing customers around EMEA of the value of virtual training (not elearning)
16	investing in new e-learning project
17	New geo structure Focus on new market of associated services for education solutions Focus on related courses e.g. Prince 2 when we sell PPM software
18	possible partner model
19	Promotion of Distance as an effective means and method of education and impact.

20	Educaion Transformation - Modularity and Multi-Modality
21	Using slack time between product releases to increase the skill sets of trainers Pushing our Sales for the obstacles they face and identifying where training can be a part of the solution
22	Business to invest in training website Training as part of the classroom solution Training credits
23	1) Closer links to direct sales channels 2) Channel incentive program
24	Unlimited LVC model 'Bootcamp' training
25	Improving sales effectiveness of training

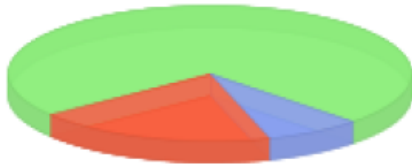
15. Sales Distribution

Thinking about how your sales are generated, select the percentage which applies to each of the following ways (number of steps removed from the customer):



Response: 26

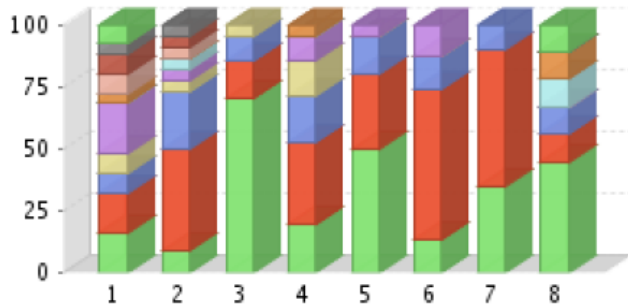
16. How will this change over the next year?



1 - No change	73.08% (19)	2 - Move closer to the customer	19.23% (5)
3 - Move further away from the customer	7.69% (2)		

Mean: 1.35
Response: 26

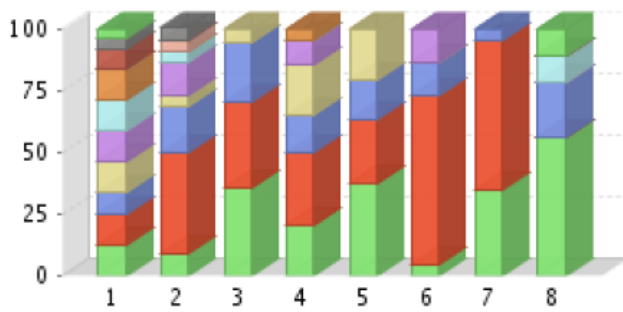
17. What percentages of your sales/bookings are generated by the following resources today?



	Zero	1-10%	11-20%	21-30%	31-40%	41-50%	51-60%	61-70%	71-80%	81-90%	91-100%	Mean
1 Own training sales/business development people:	16% (4)	16% (4)	8% (2)	8% (2)	20% (5)	0% (0)	4% (1)	8% (2)	8% (2)	4% (1)	8% (2)	4.96
2 Company hardware or software product salespeople:	9.09% (2)	40.91% (9)	22.73% (5)	4.55% (1)	4.55% (1)	4.55% (1)	0% (0)	4.55% (1)	4.55% (1)	4.55% (1)	0% (0)	3.5
3 Education embedded automatically within product contracts	70% (14)	15% (3)	10% (2)	5% (1)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	1.5
4 Company customer account managers:	19.05% (4)	33.33% (7)	19.05% (4)	14.29% (3)	9.52% (2)	0% (0)	4.76% (1)	0% (0)	0% (0)	0% (0)	0% (0)	2.81
5 Telesales/Telemarketing resource:	50% (10)	30% (6)	15% (3)	0% (0)	5% (1)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	1.8
6 Company Website:	13.04% (3)	60.87% (14)	13.04% (3)	0% (0)	13.04% (3)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	2.39
7 Outbound digital marketing/Advertising:	35% (7)	55% (11)	10% (2)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	1.75
8 Other:	44.44% (4)	11.11% (1)	11.11% (1)	0% (0)	0% (0)	11.11% (1)	11.11% (1)	0% (0)	0% (0)	0% (0)	11.11% (1)	3.67

Response: 26

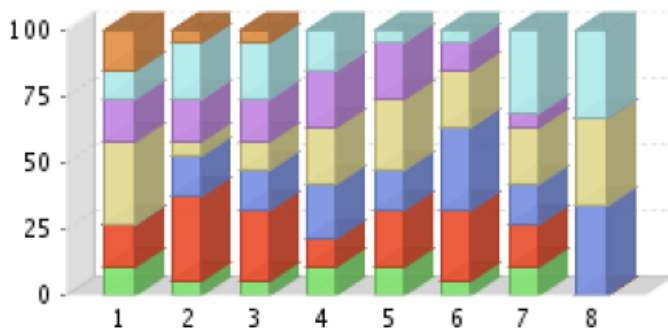
18. What percentages of your sales/bookings are generated by the following resources next year?



	Zero	1-10%	11-20%	21-30%	31-40%	41-50%	51-60%	61-70%	71-80%	81-90%	91-100%	Mean
1 Own training sales/business development people:	12.5% (3)	12.5% (3)	8.33% (2)	12.5% (3)	12.5% (3)	12.5% (3)	12.5% (3)	0% (0)	8.33% (2)	4.17% (1)	4.17% (1)	5
2 Company hardware or software product salespeople:	9.09% (2)	40.91% (9)	18.18% (4)	4.55% (1)	13.64% (3)	4.55% (1)	0% (0)	4.55% (1)	0% (0)	4.55% (1)	0% (0)	3.41
3 Education embedded automatically within product contracts	35.29% (6)	35.29% (6)	23.53% (4)	5.88% (1)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	2
4 Company customer account managers:	20% (4)	30% (6)	15% (3)	20% (4)	10% (2)	0% (0)	5% (1)	0% (0)	0% (0)	0% (0)	0% (0)	2.9
5 Telesales/Telemarketing resource:	36.84% (7)	26.32% (5)	15.79% (3)	21.05% (4)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	2.21
6 Company Website:	4.55% (1)	68.18% (15)	13.64% (3)	0% (0)	13.64% (3)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	2.5
7 Outbound digital marketing/Advertising:	35% (7)	60% (12)	5% (1)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	1.7
8 Other:	55.56% (5)	0% (0)	22.22% (2)	0% (0)	0% (0)	11.11% (1)	0% (0)	0% (0)	0% (0)	0% (0)	11.11% (1)	3.11

Response: 25

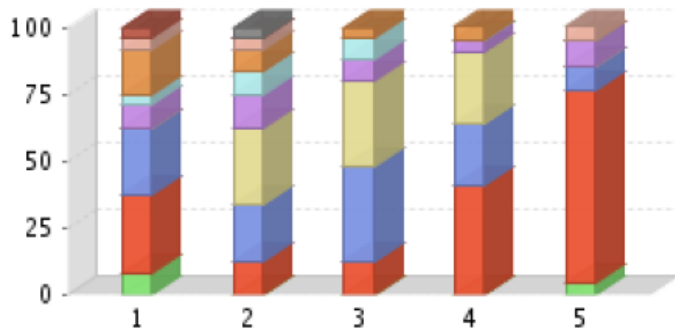
19. If you sell indirectly, please rate the following ways to create demand for training products, where 1 is no value and 7 is very high value.



	1 - no value	2	3	4	5	6	7 - very high value	Mean
1 Salesforce/reseller commissions:	10.53% (2)	15.79% (3)	0% (0)	31.58% (6)	15.79% (3)	10.53% (2)	15.79% (3)	4.21
2 Special salesforce/reseller promotions:	5.26% (1)	31.58% (6)	15.79% (3)	5.26% (1)	15.79% (3)	21.05% (4)	5.26% (1)	3.79
3 End user/customer promotions:	5.26% (1)	26.32% (5)	15.79% (3)	10.53% (2)	15.79% (3)	21.05% (4)	5.26% (1)	3.89
4 Salesforce/reseller training:	10.53% (2)	10.53% (2)	21.05% (4)	21.05% (4)	21.05% (4)	15.79% (3)	0% (0)	3.79
5 Salesforce/reseller events:	10.53% (2)	21.05% (4)	15.79% (3)	26.32% (5)	21.05% (4)	5.26% (1)	0% (0)	3.42
6 Marketing collateral (brochures, catalogues):	5.26% (1)	26.32% (5)	31.58% (6)	21.05% (4)	10.53% (2)	5.26% (1)	0% (0)	3.21
7 Promotional campaigns:	10.53% (2)	15.79% (3)	15.79% (3)	21.05% (4)	5.26% (1)	31.58% (6)	0% (0)	3.89
8 Other:	0% (0)	0% (0)	33.33% (1)	33.33% (1)	0% (0)	33.33% (1)	0% (0)	4.33

Response: 20

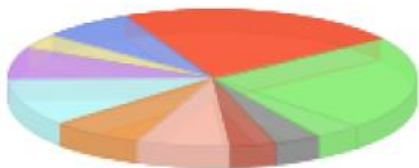
20. Timing of Sales - How soon after the hardware/software sale is training bought by the customer? Please specify what percentage of your sales happen when.



	Zero	1-10%	11-20%	21-30%	31-40%	41-50%	51-60%	61-70%	71-80%	81-90%	91-100%	Mean
1 At the point of purchase of the hardware/software:	8.33% (2)	29.17% (7)	25% (6)	0% (0)	8.33% (2)	4.17% (1)	16.67% (4)	4.17% (1)	4.17% (1)	0% (0)	0% (0)	3.96
2 Within 3 months of the purchase:	0% (0)	12.5% (3)	20.83% (5)	29.17% (7)	12.5% (3)	8.33% (2)	8.33% (2)	4.17% (1)	0% (0)	4.17% (1)	0% (0)	4.5
3 Between 3 and 6 months of the purchase:	0% (0)	12% (3)	36% (9)	32% (8)	8% (2)	8% (2)	4% (1)	0% (0)	0% (0)	0% (0)	0% (0)	3.76
4 Between 6 and 12 months of the purchase:	0% (0)	40.91% (9)	22.73% (5)	27.27% (6)	4.55% (1)	0% (0)	4.55% (1)	0% (0)	0% (0)	0% (0)	0% (0)	3.14
5 More than a year after th purchase:	4.76% (1)	71.43% (15)	9.52% (2)	0% (0)	9.52% (2)	0% (0)	0% (0)	4.76% (1)	0% (0)	0% (0)	0% (0)	2.62

Response: 26

21. In the last Fiscal period, what percentage of hardware/software turnover was training revenue?



1 - less than 1%	22.22% (6)	2 - 1%	22.22% (6)
3 - 2%	7.41% (2)	4 - 3%	3.7% (1)
5 - 4%	7.41% (2)	6 - 5%	11.11% (3)
7 - 6-7%	7.41% (2)	8 - 8-9%	7.41% (2)
9 - 10-12%	3.7% (1)	10 - 13-15%	3.7% (1)
11 - more than 15%	3.7% (1)		

Mean: 4.3

Response: 27

22. In the next Fiscal period, what percentage of hardware/software turnover does training revenue need to be?



1 - less than 1%	22.22% (6)	2 - 1%	14.81% (4)
3 - 2%	7.41% (2)	4 - 3%	0% (0)
5 - 4%	7.41% (2)	6 - 5%	18.52% (5)
7 - 6-7%	7.41% (2)	8 - 8-9%	11.11% (3)
9 - 10-12%	0% (0)	10 - 13-15%	7.41% (2)
11 - more than 15%	3.7% (1)		

Mean: 4.78

Response: 27