

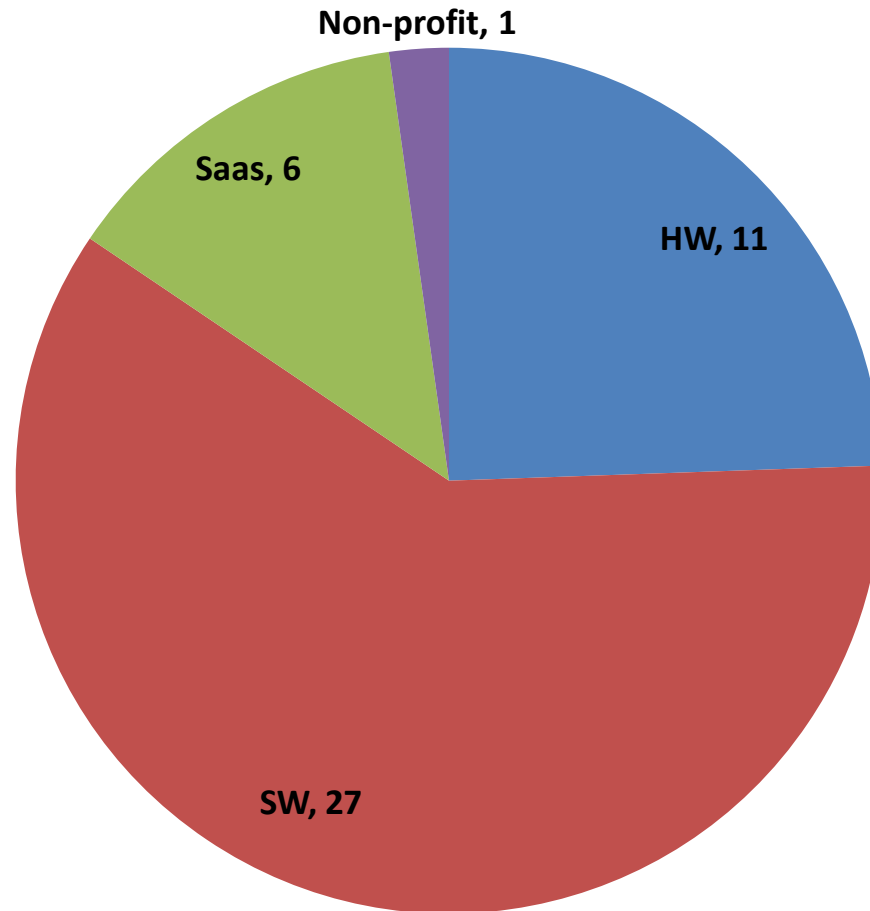


Pulse of the Industry

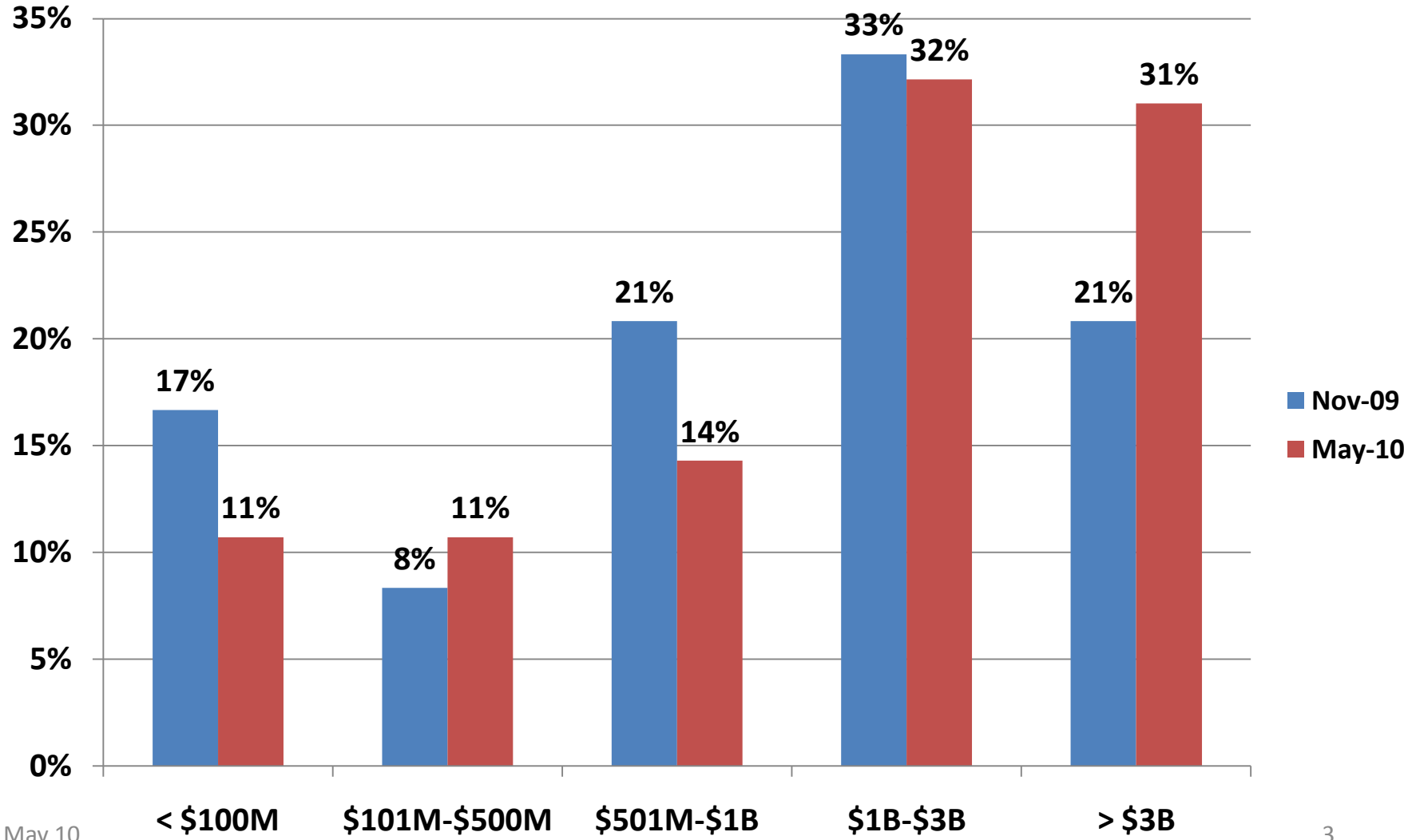
plus **Hot Topics/Issues**

Mike Dowsey, CEdMA Europe

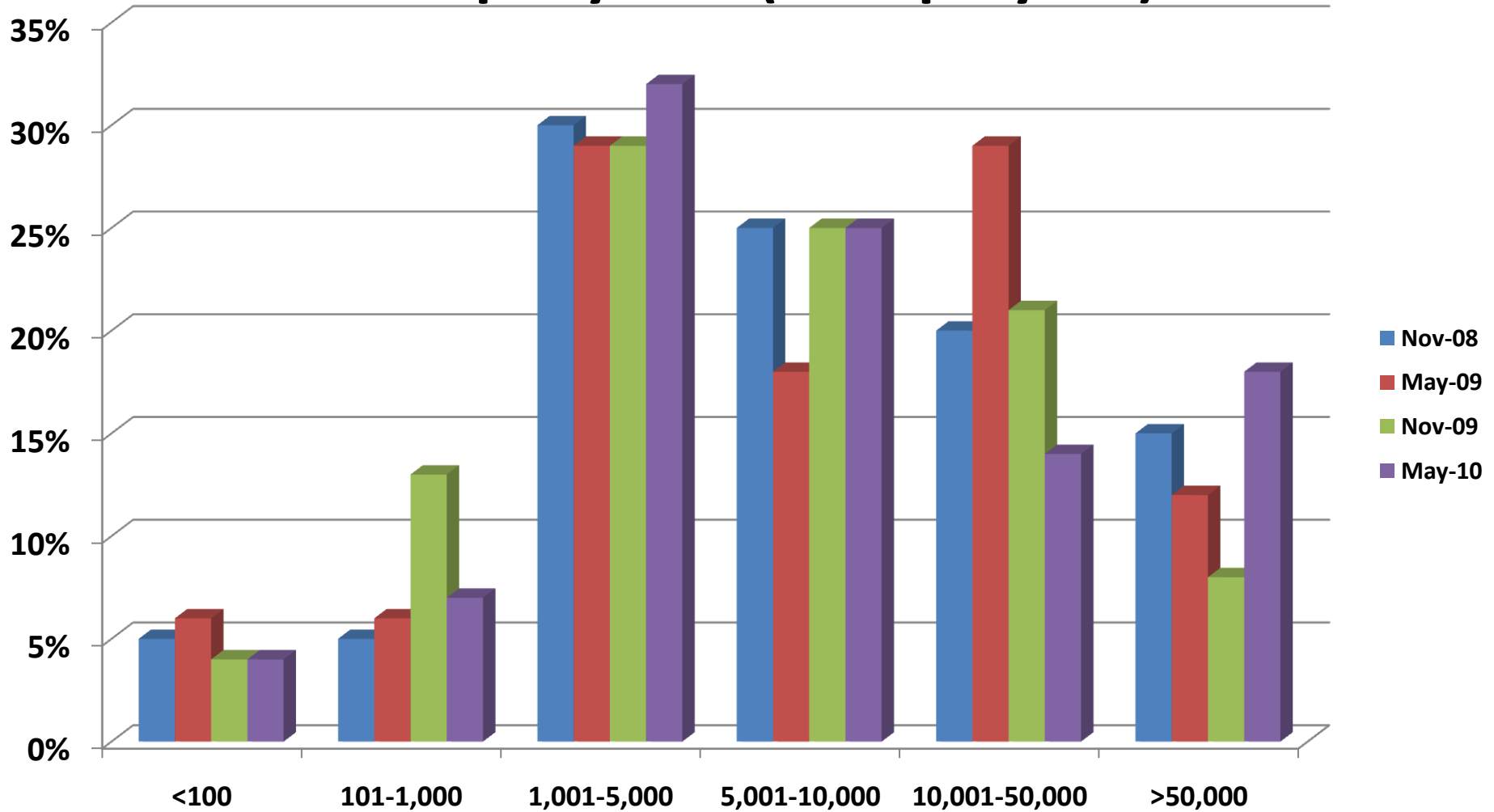
What is your Company Type?



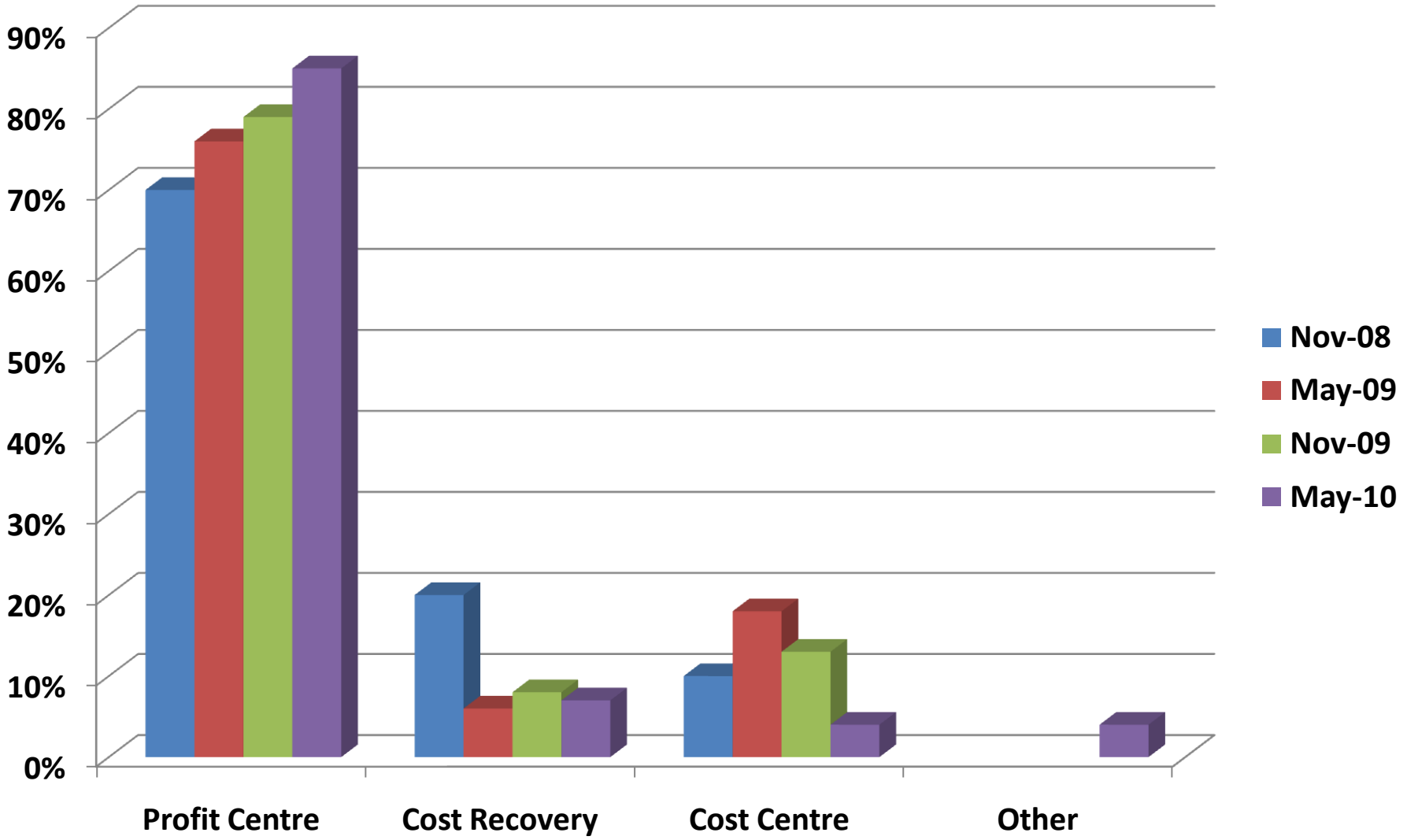
Company Worldwide Revenue



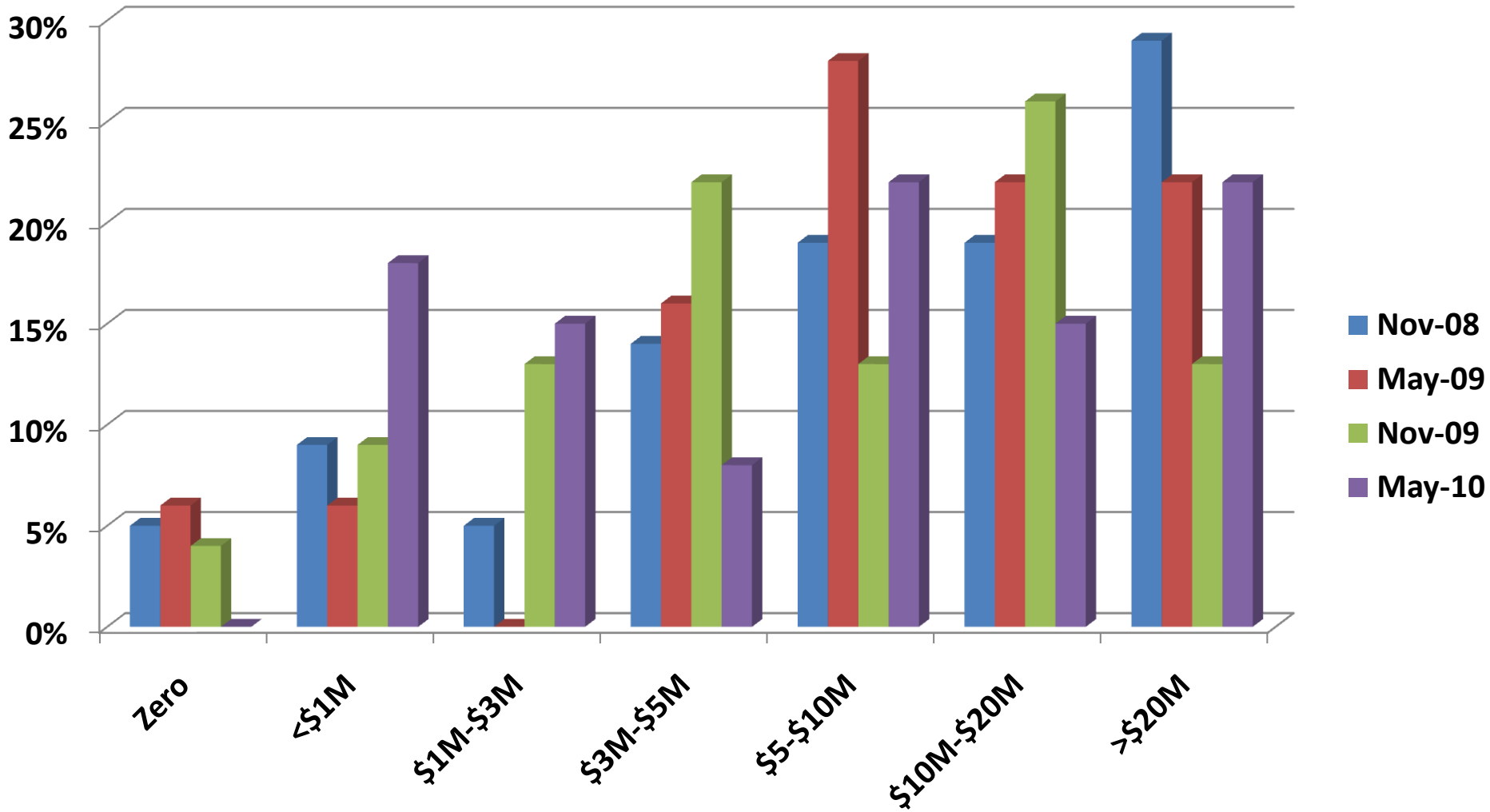
Company Size (# Employees)



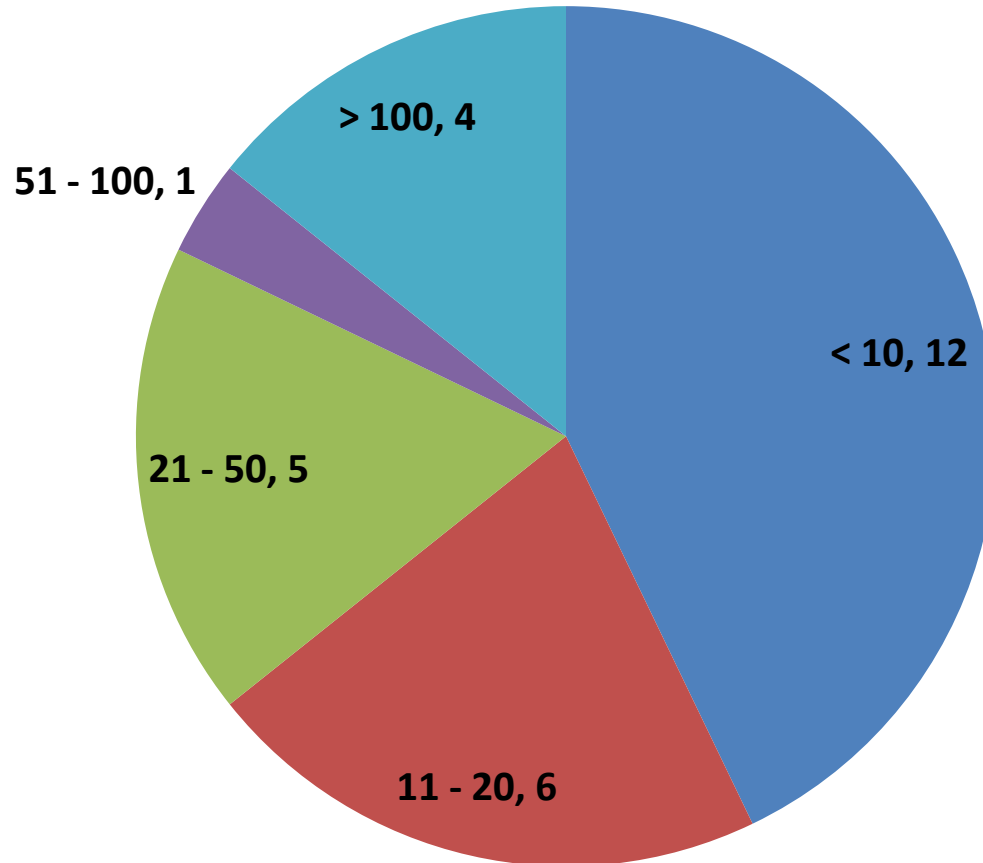
Training Business Model



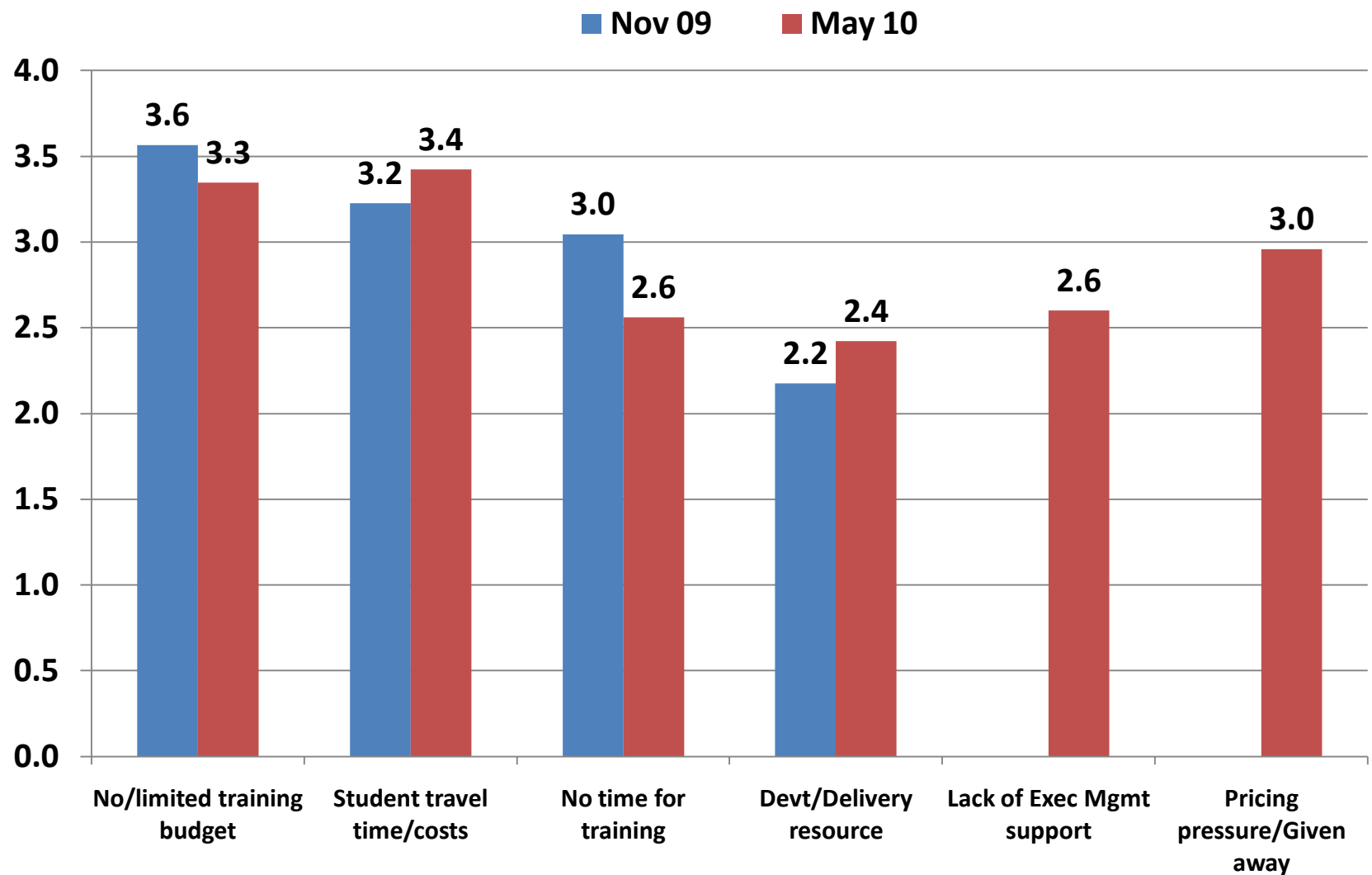
Annual Revenue in your Chosen Geography



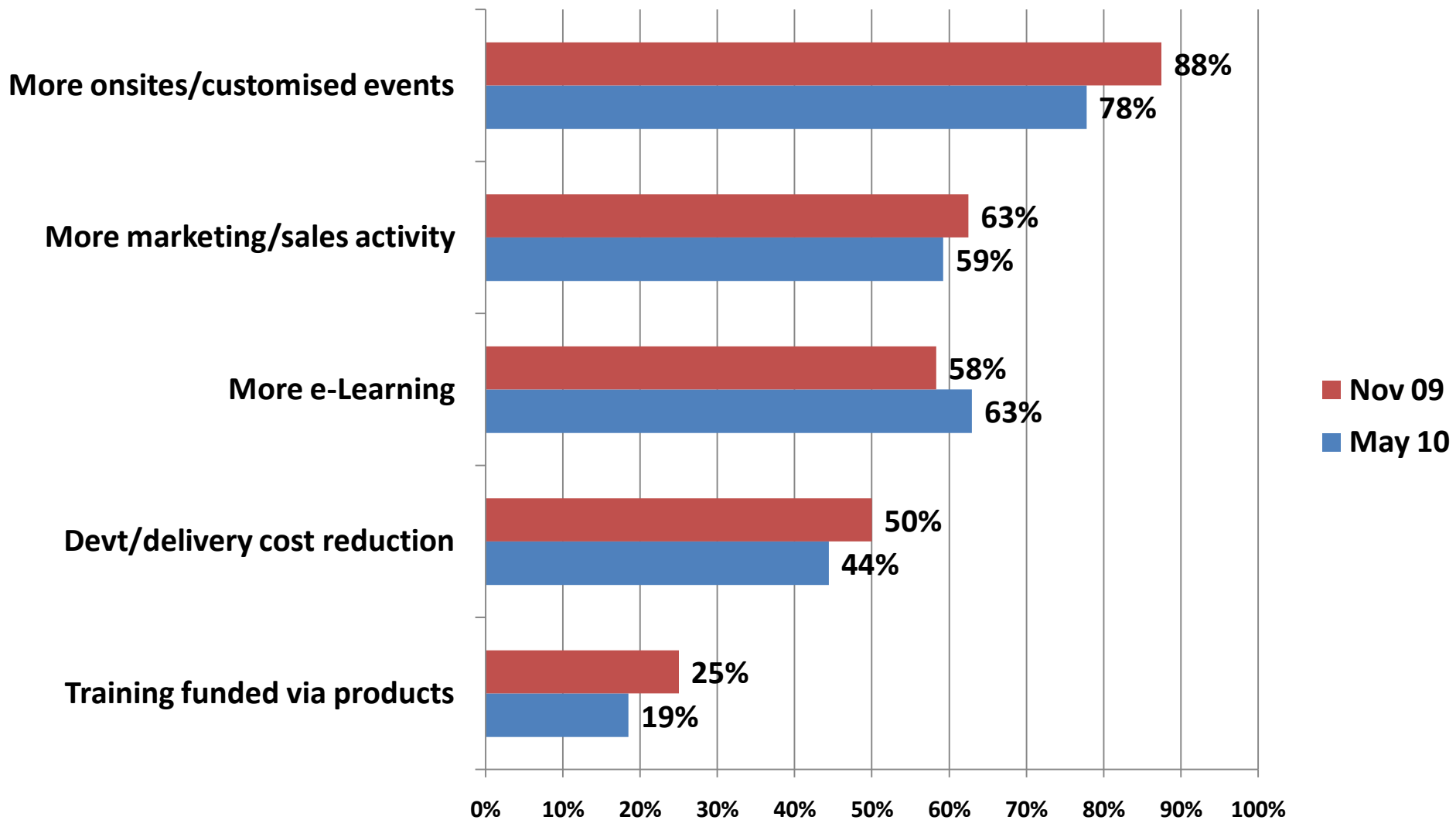
Education Headcount in your Chosen Geography



Current Training Obstacles



Which of the following actions have you taken?

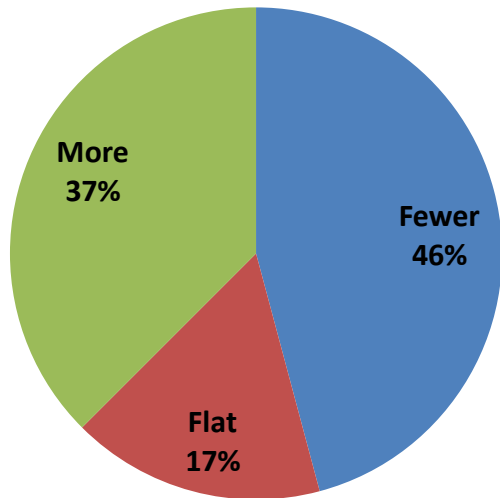


Most Successful Solutions in 2009-2010

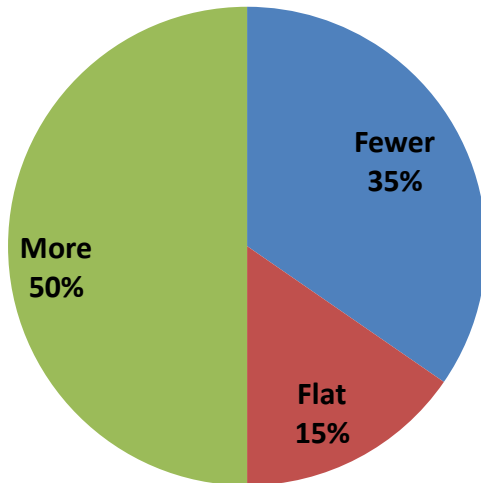
22 inputs included:

- More/introduced Virtual Classroom – 4
- More customized offerings – 4
- More onsite – 3
- (E)mailshots – 2
- Introduced dedicated education sales rep – 2
- Outsourcing development/fulfilment, royalties from partner delivery, blended ILT/WBT, mentoring, motivation sales reps, education credits, student gifts, end-user rollouts, fewer offerings, higher attach rates

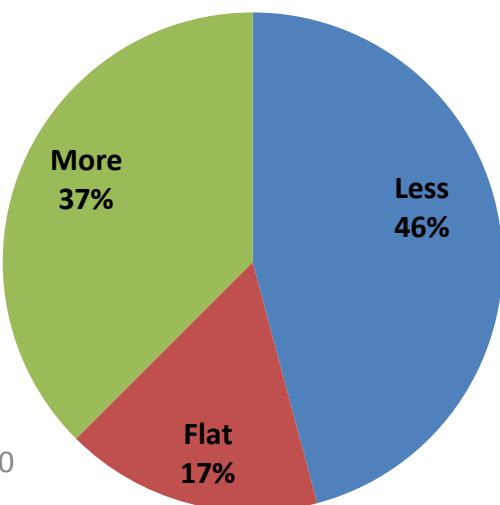
Students Trained 08 to 09 (Nov 09)



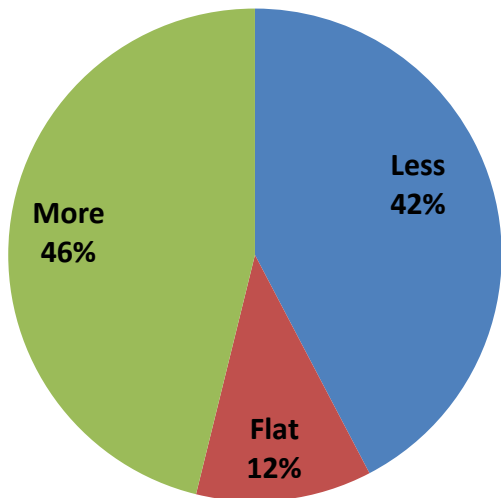
Students Trained 09 to 10 (May 10)



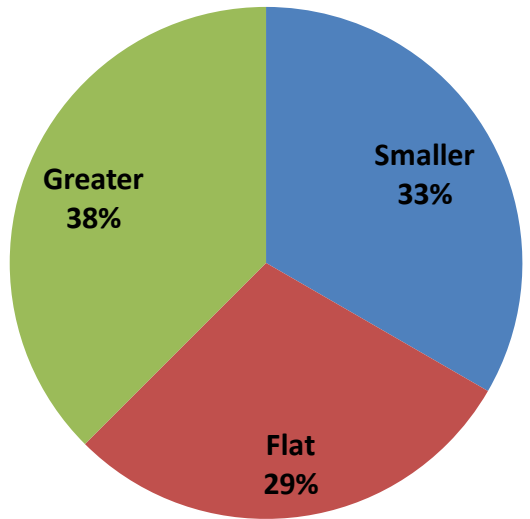
Revenue 08 to 09 (Nov 09)



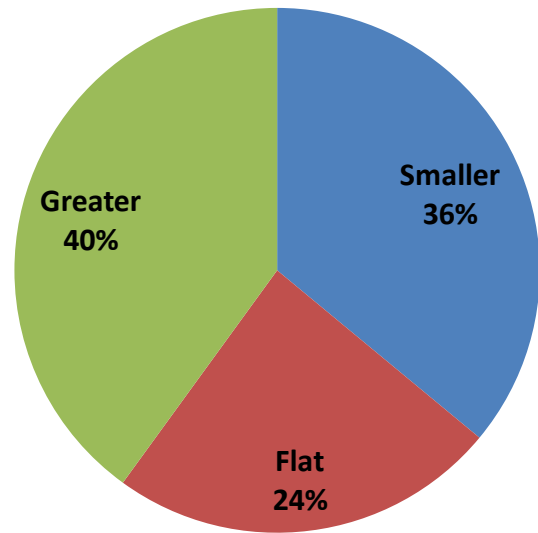
Revenue 09 to 10 (May 10)



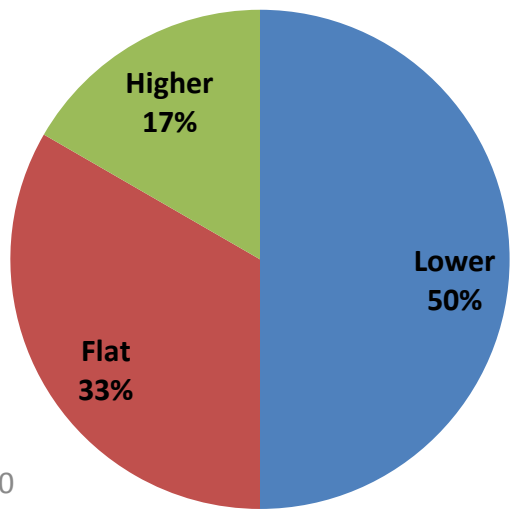
Margin 08 to 09 (Nov 09)



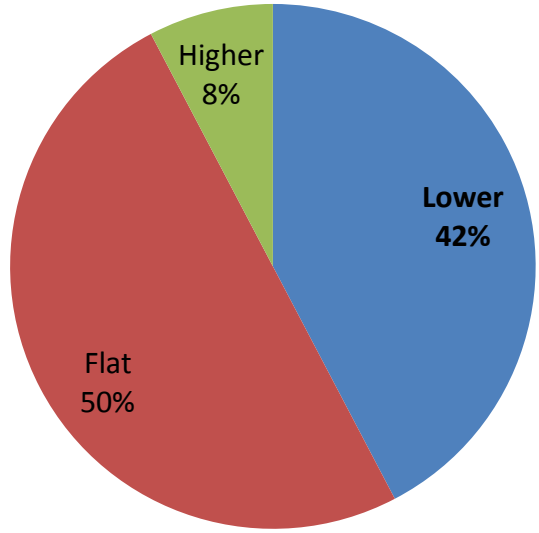
Margin 09 to 10 (May 10)



Headcount 08 to 09 (Nov 09)



Headcount 09 to 10 (May 10)

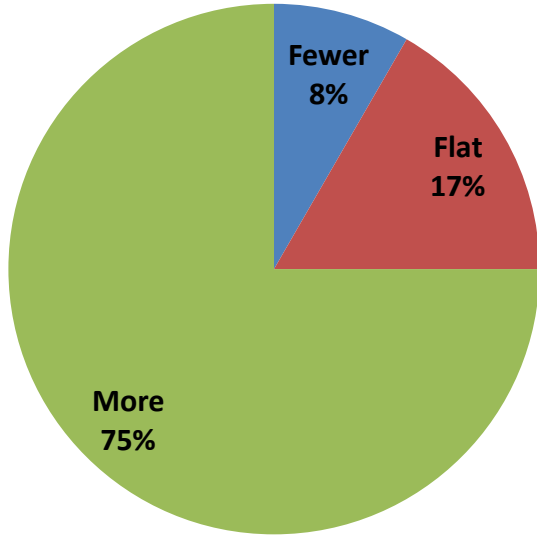


What are your major challenges, moving through 2010?

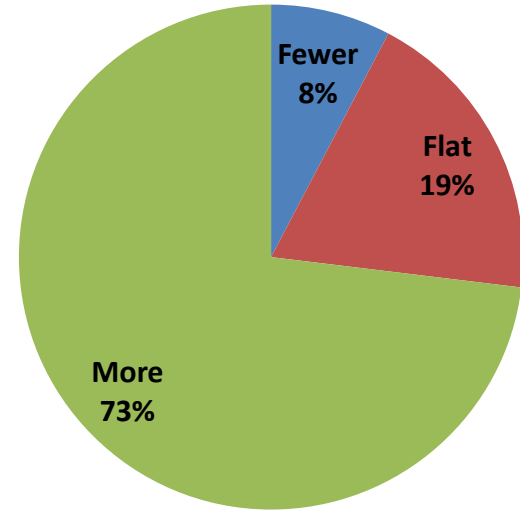
24 inputs included:

- Increase revenue and/or margin – 6
- Budget allocation – 5
- Doing more with less – 4
- More students/public classes – 3
- Focusing the sales force – 3
- New courseware/WBT instead of ILT – 3
- Certification – 3
- Working with partners – 3
- More customised/onsites – 2
- Poor executive backing, economic recovery, travel and time, acquisition, fixing fulfilment

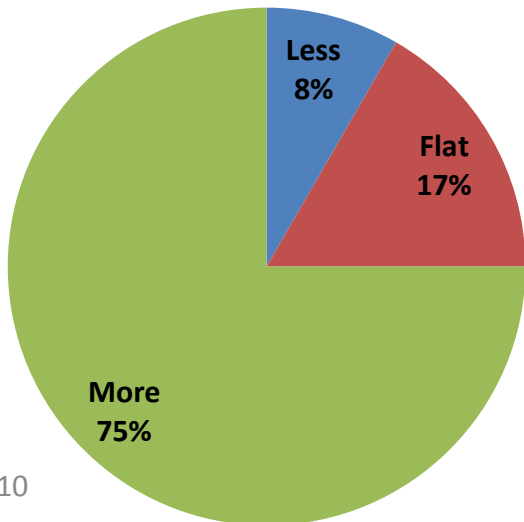
Students Trained Forecast



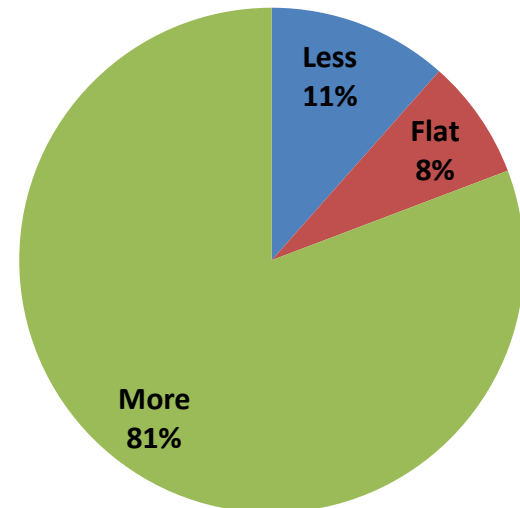
Students Trained Revised Forecast



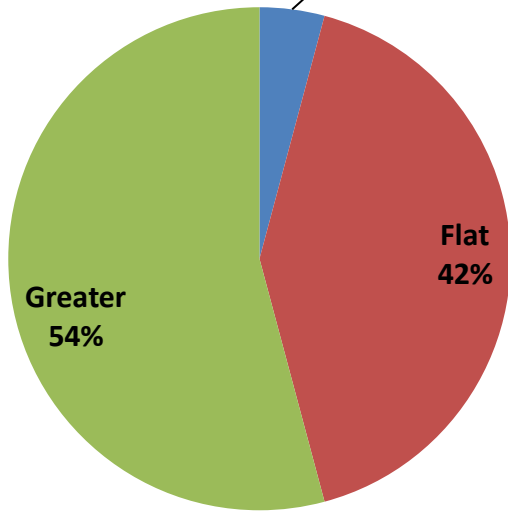
Revenue Forecast



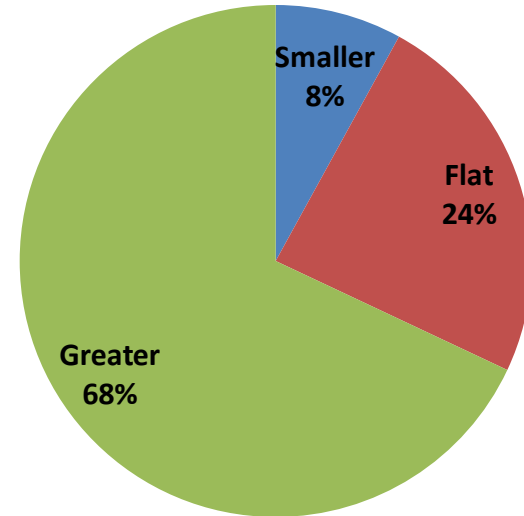
Revenue Revised Forecast



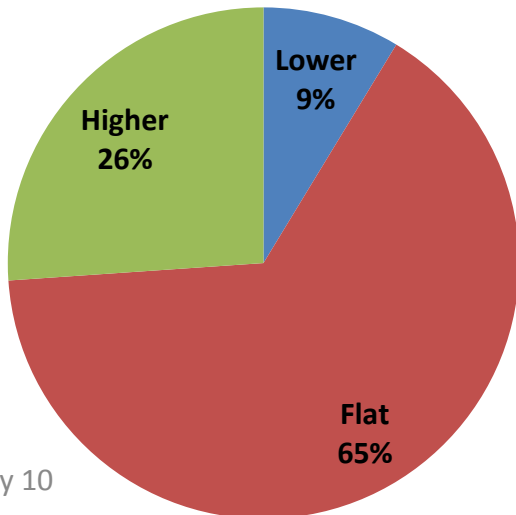
Margin Forecast



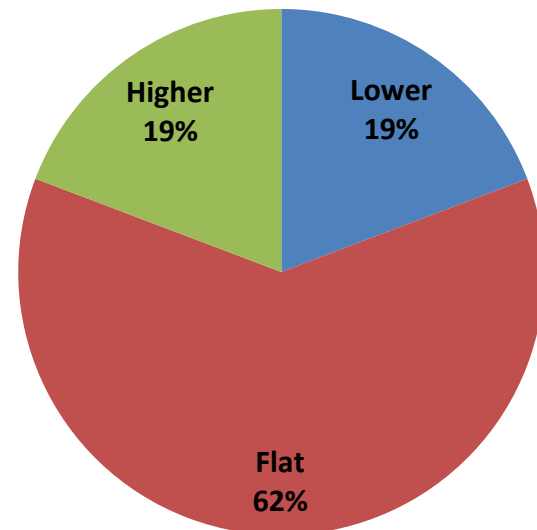
Margin Revised Forecast



Headcount Forecast



Headcount Revised Forecast



Cross-tabbing – How are companies predicting revenue growth compared to their size in education revenue?

| | -20% to 0% | 0% (flat) | 0% to +10% | +10% to +20% | >+20% | Total |
|---------------------------|------------|------------|------------|--------------|------------|-------|
| Zero (cost center) | 0% (0) | 0% (0) | 0% (0) | 0% (0) | 0% (0) | 0 |
| Less than \$500K | 0% (0) | 0% (0) | 33.33% (1) | 33.33% (1) | 33.33% (1) | 3 |
| \$500K but less than \$1M | 0% (0) | 0% (0) | 100% (1) | 0% (0) | 0% (0) | 1 |
| \$1M but less than \$3M | 0% (0) | 0% (0) | 20% (1) | 60% (3) | 20% (1) | 5 |
| \$3M but less than \$5M | 0% (0) | 0% (0) | 50% (1) | 50% (1) | 0% (0) | 2 |
| \$5M but less than \$10M | 0% (0) | 16.67% (1) | 16.67% (1) | 16.67% (1) | 33.33% (2) | 6 |
| \$10M but less than \$25M | 0% (0) | 25% (1) | 50% (2) | 25% (1) | 0% (0) | 4 |
| \$25M or more | 28.57% (2) | 0% (0) | 28.57% (2) | 42.86% (3) | 0% (0) | 7 |
| Total | 2 | 2 | 9 | 10 | 4 | 28 |

Correlation Coefficient: -0.3059383

What major initiatives are you taking during 2010?

23 inputs included:

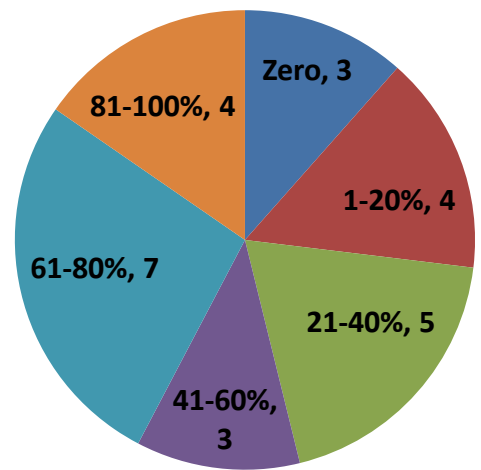
- More and better selling and attach to product sales – 8
- New and/or more e-learning – 7
- Lead generation/marketing – 3
- Working closer with partners – 3
- Licensing courseware – 2
- Customised services, adding extras to courses, integration into the new org, outsourcing parts of operation, introducing new metrics, following up with students, training credits, instructor development



Questions?

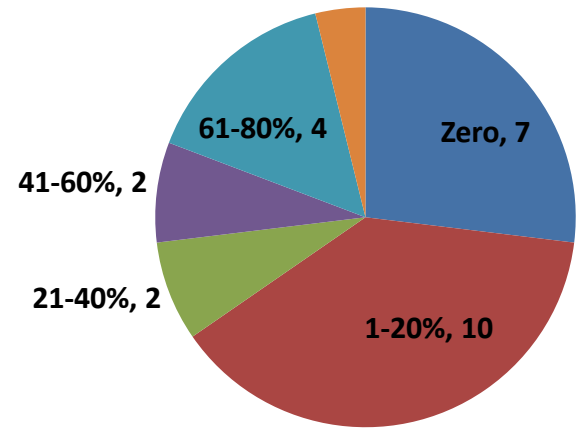
Thinking about how your sales are generated, select the percentage which applies to each of the following:

Direct to customer

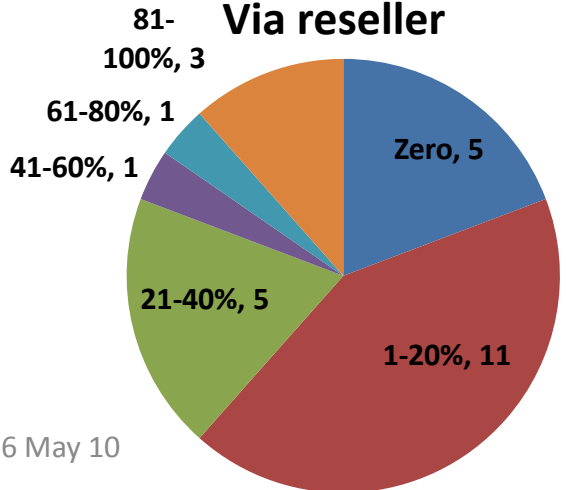


81-100%, 1

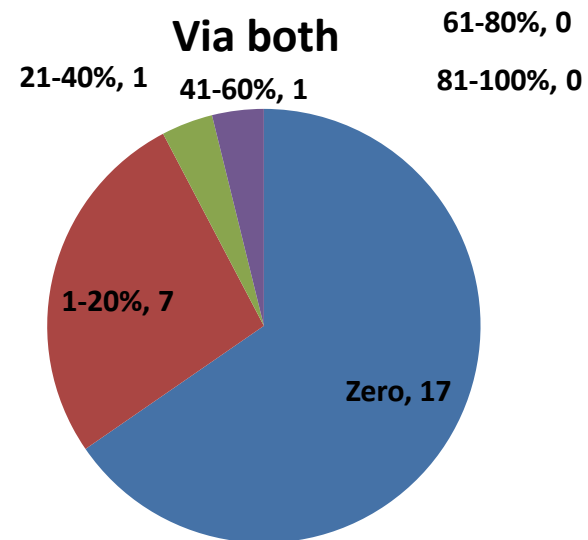
Via internal sales



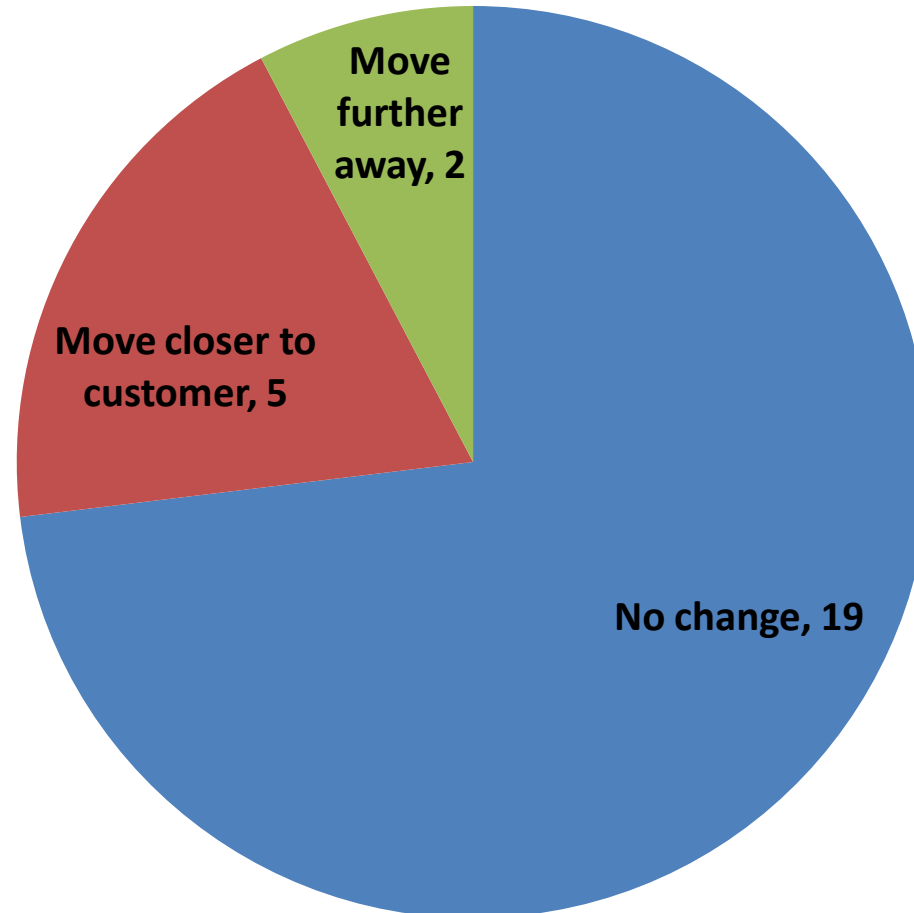
Via reseller



Via both

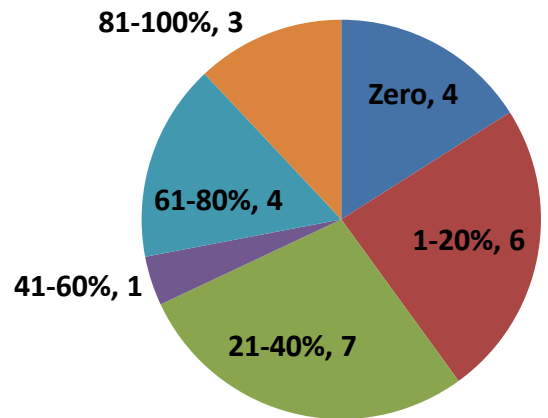


How will this change over the next year?

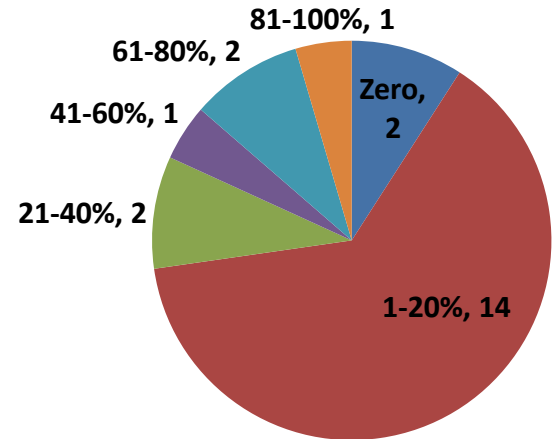


What percentages of your sales/bookings are generated by the following resources today?

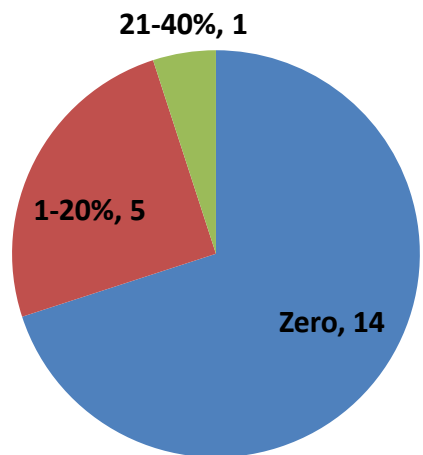
Own sales/bus devt



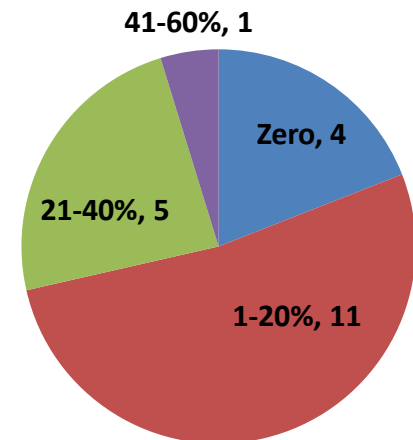
Company product sales



Within product contacts

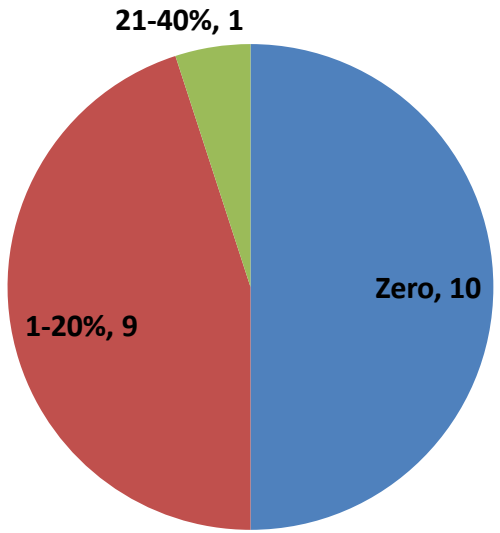


Account managers

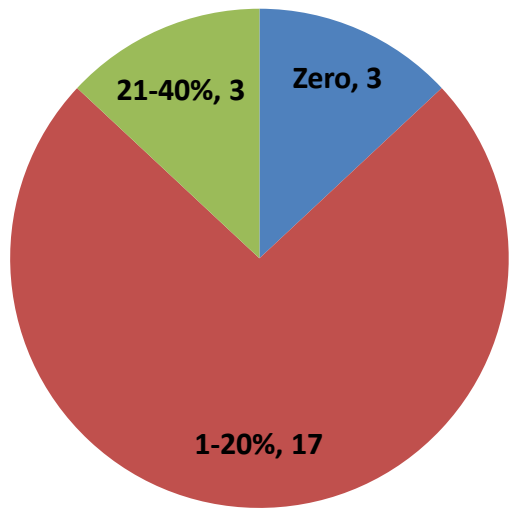


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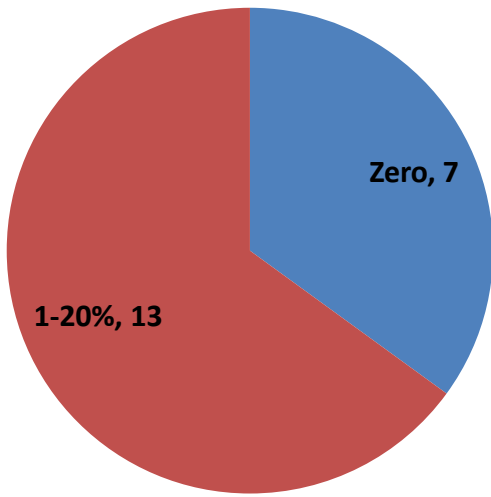
Telesales/mktg



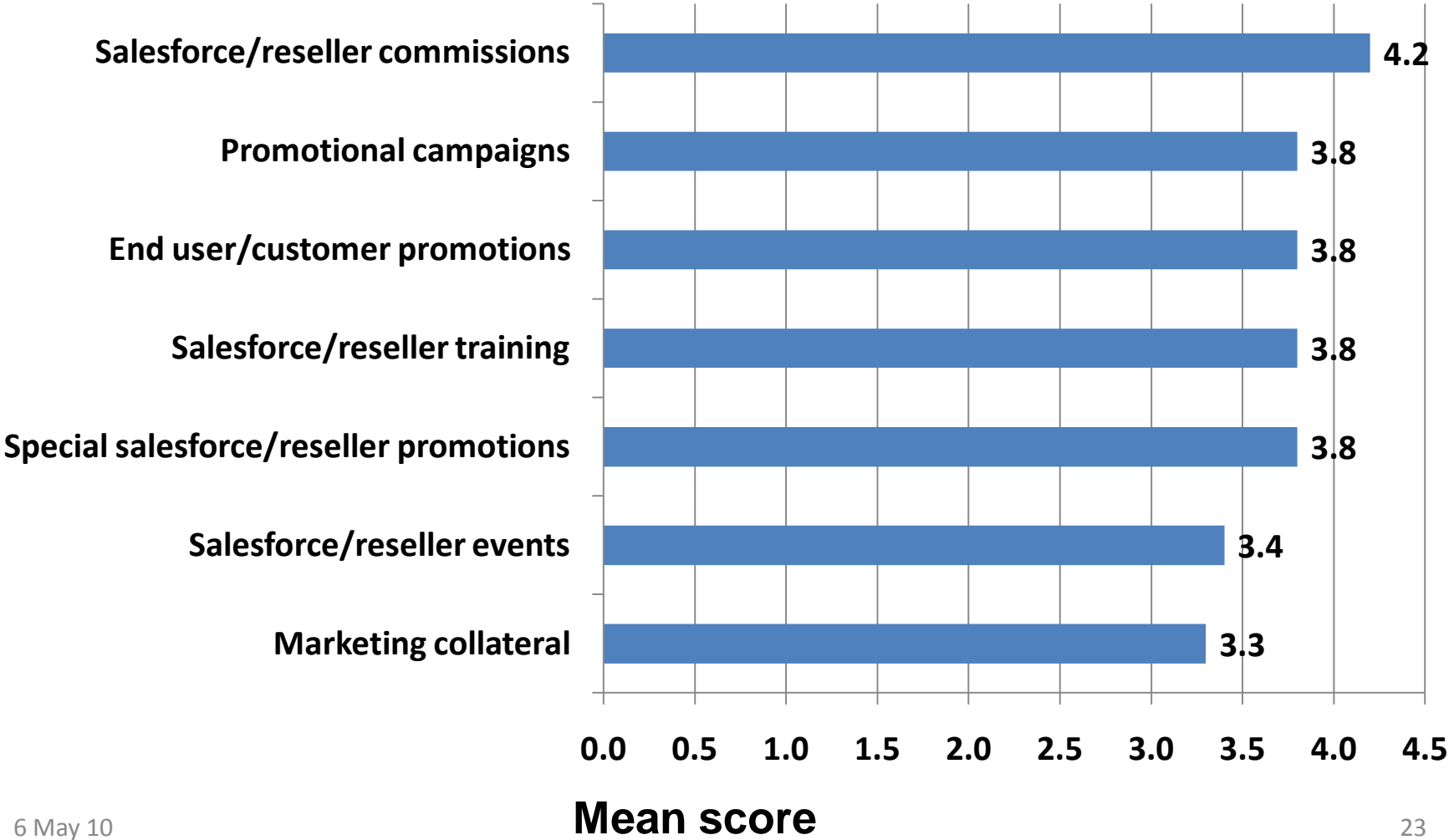
Website



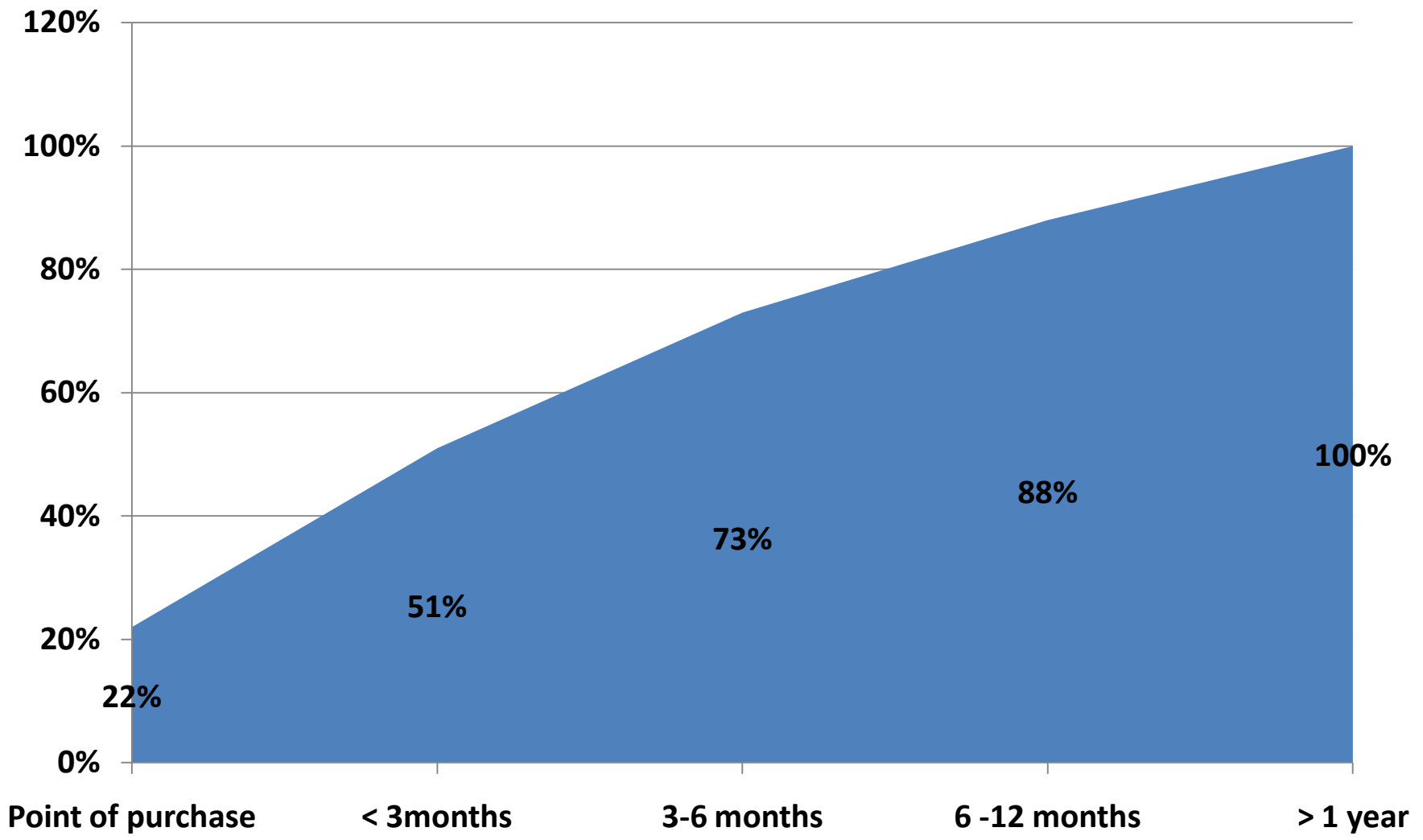
Outbound collateral



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.



How soon after the product sale is training bought? What percentages?



What percentage of product turnover is (will be) training revenue?

