



CEdMA Conference, 17th April 2013

“Hot Topics Discussion”

Basis of selection



- Quantitative survey data
- Number of people feeding back the same comment
- Impact on business

Balance of Increase in Private with Decrease in Public



NB outcomes from previous discussions are available via the website



Factors from survey

ILT revenue increase has fallen from 4.5% to 2.5% over two years

Public ILT Classes have fallen from a 4% increase to flat over two years

Private ILT Classes show a constant 3% increase over two years

VILT revenue shows a constant 3% increase over two years

Learning Technologies show a constant 3% increase over two years

Conclusions

ILT is a long way from dying – still 70-80% of total revenue

VILT is a long way from taking over – only 5-10% of total revenue

LT is also a long way from taking over – only 5-10% of total revenue

Subject Areas showing Biggest Increase



Private training – onsite and virtual

E-learning, including Tools

Partner training

Customisation and bespoke

Subject Areas showing Biggest Decrease



Public training

Public training

Public training

Comments on the IT Training Market



1. We have seen our training revenues double in the last quarter, the trend this quarter is the same
2. Need to understand if training market grows or if the new product rollout wave intrinsically generates more growth by itself
3. In addition to this dashboard report, what would help me would be to be able to confidently show back to my business further examples of how vendor training orgs are performing in the EMEA market. A snapshot view would be good or existing whitepapers that I am not aware of would be also useful.
4. Trend that people want to do more "on their own" with more flexibility, such as e-Learning, Mentoring, TTT
5. More and more larger customers want content to be customised to their specific requirements. Other customers are very focused on costs and are looking to be able to demonstrate discounts.
6. Developing a partner certification program was and is a challenge
7. Ever increasing demand for private, onsite workshops; Customers still want ILT despite same curriculum in self-study format; VILT demand increasing
8. We are on the cusp of major change within the learning market.
9. Unpredictable
10. Overall we are still a growth company, but as ever there are ebbs and flows over where the revenue comes from - both geographically and in terms of business line.

Discussion Topics



1 On demand and flexible resourcing

Public trending down

Private up

More bespoke

How do meet the resource challenge?

2 Product sales selling training

What enablement do they need?

What comp plan do they need?

Reliance on new license sales.

3 How to Innovate in the current economy?

Customers having constraints – how can we help?

Longer decision times and longer projects

New methodologies

Long term vision...

4 Certification Trending down?

Fee or free?

Breakout activities – 25 minutes



- **Discuss** the topic in your group
 - Your experience of the topic
 - How the topic has affected your business
 - What actions you have taken regarding the topic
 - Results from your actions – good and bad

- **Record your findings** so that they can be shared on our website and as ongoing discussions on our LinkedIn group

- 1 person to feedback a summary for maximum 10 minutes :
 1. Business affects seen
 2. Actions taken
 3. Results and recommendations