

January 5, 2009

The eLearning Guild's
LEARNING SOLUTIONSSM

Practical Applications of Technology for Learning e-Magazine

THIS WEEK: Management Strategy

Surviving 2009

By **Bill Brandon**

In 2009, the economy is likely to be the biggest determinant of what happens (or doesn't happen) for most of us in the e-Learning world. However, it would be a mistake to think that this means "everything e-Learning" is going to come to a halt. In the past, economic downturns have often created opportunities for those who are prepared. In this article, I will offer some ideas and tips based on my experience in training and e-Learning since 1968 – which includes several of these periods of economic hard times.

Faced with this situation, it is natural for people to focus on the negative aspects. There are hiring freezes, position cuts and layoffs, budget cuts, and other serious effects of recession to worry about. There is also the possibility that one might do one's job superlatively, and yet be laid off, or that the company might fail, due to circumstances beyond one's knowledge or control. These are normal fears; they get seemingly endless coverage in the media, and they are the common topic of everyday conversations.

However, it is important for managers to remember three other important facts. First, recessions have happened before. Second, recessions are survivable, even if they aren't pleasant. Third, downturns and recessions always represent opportunity for those who know how to position themselves for the future. You do have resources, including The eLearning Guild, which you can use to your advantage.

When the economy takes a turn for the worse, all organizations tighten their belts and adjust their priorities. This includes e-Learning activities. While the situation is serious, there are many things that managers can do to ensure that online learning supports corporate strategy and direction in a recession. This week's article outlines some of the things you should be thinking about at the start of this challenging year.

A publication of



Learning from the past

There were global recessions in 1973 -1975, 1981, 1990-1993, 1998, and 2001-2002, according to the International Monetary Fund (IMF). The current U.S. recession started in December 2007 (says the National Bureau of Economic Research), and this has led to the current global concerns. 1981 was the worst of the past recessions; 1973 - 1975 was the longest.

Some analysts think the current recession could be longer, and possibly more serious, than any in the last 40 years; not everyone agrees with this assessment because conditions today are much more complex than they were in the earlier recessions. But the key thing to remember is that all recessions come to an end, and generally they lead to much better times. Use the next 12 to 18 months (if the recession lasts that long) to rethink, and rebuild, your e-Learning strategy, and to help your organization come through stronger and more competitive.

Many e-Learning professionals went through the 1990-1993 recession, but most were probably not actually involved in e-Learning at the time. This means that it can be slightly more difficult to apply the lessons learned from that experience to today. It is worth reflecting that most organizations survived that recession,

and that the boom that followed it was one of the most prosperous on record. There is no reason to think that the outcome this time will be any different.

In fact, in some ways, we e-Learning professionals are in a far better position now, and better supported by technology, than were training and development professionals in the early 1990s. E-Learning, in most organizations, is better accepted than training departments were two decades ago, and in many cases e-Learning is now actually a key part of business strategy.

Let's move on to the tips.

Do the obvious

Just because these first tips are obvious, does not mean that everyone will consider them. These must be the foundation of your strategy. It is extremely important to prioritize your spending and your programs.

First, plan for budget and staff cuts. Needless to say, budgets are going to get a lot of scrutiny. Depending on your company and your industry, there will probably be at least a brief freeze on hiring, and you may lose some positions. Even if you don't know how much you'll have to cut, you should already know what will have to go first. This is never easy, but you don't want to be in the position of having things dictated to you.

Just doing the obvious won't be enough, though. You must make business results and customer satisfaction your priorities, even more than in "normal" times!



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Learning Solutions e-Magazine™ is published weekly for members of **The eLearning Guild**, 375 E Street, Suite 200, Santa Rosa, CA 95404. Phone: +1.707.566.8990. www.eLearningGuild.com

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Management Strategies

If your organization is downsizing and freezing hiring, be sure that you change your focus to staff development. You can suspend new-employee training applications and updates until the hiring freeze lifts. Adjust your budgets and staffing appropriately.

Second, pet projects will have to go on the shelf for the duration of the downturn, unless they have a very clear connection to revenue generation and productivity. This might involve delaying minor updates or non-essential software upgrades, or it might mean putting off selected new program development until 2010.

Next, carefully consider whether you have sufficient justification for continuing any "generic" or "nice to have" training. It will be critical to focus only on the essential during the coming months, and you will need to prepare to justify continuing support for even some of what you think is essential. It is simpler to do this if you have nothing in your curriculum that management can consider "deadwood." Base your decisions on ROI (Return on Investment) that you can show, on cost savings or proven contributions to revenue, and on contribution to corporate strategic goals during the period of the downturn.

Finally, review all of your current e-Learning offerings. Make sure that they are tightly tailored, and that modules and courses are as short as possible. Do everything you can to measure and track results. If an application is not producing the desired results, don't be afraid to revise or drop it.

It is far better to assume in advance that cuts and

delays will happen, and to think about what you will do, than to assume that everything is "normal until told otherwise."

Connect to the business

Just doing the obvious won't be enough, though. You must make business results and customer satisfaction your priorities, even more than in "normal" times! This means supporting organization objectives for reduced costs, improved productivity, and results in key areas. In addition, you must do this in a way that keeps you visible as a contributing part of the team.

Find ways to cut costs thru training

This is a good time, if you aren't already doing this, to take someone in the Accounting Department to lunch. Find out where the opportunities are for improving the use of corporate funds. These opportunities may be in areas that you can impact directly (reducing travel expenses by using synchronous e-Learning to replace classroom instruction, for example) or those in which you can provide specific e-Learning applications to address specific challenges for specific business units.

Find ways to improve productivity thru learning interventions

When companies are downsizing, productivity improvement sometimes means finding ways to do the same job with fewer people. However, the more basic, positive rationale for productivity improvement is to

Many business units, especially Information Technology (IT), manufacturing, and distribution, will turn to smaller projects that they can complete quickly and that will provide a return in under a year. There is a performance support / training / learning / change management component to many of these projects.

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support doing more with the same number of people. It's an important distinction.

As you network with managers in your organization, look for ways in which e-Learning can support or create productivity improvement. An often-overlooked element in downsizing strategy is helping the "survivors" pick up and fulfill the accountabilities that the recently departed formerly covered. This need not involve classroom instruction or staff meetings, for which there is little time anyway in this environment. Wikis, for example, can provide a valuable reservoir of knowledge – and of course it helps if the wikis are well established and populated before the downsizing begins.

What if your organization has no established knowledge management initiative? Three tried-and-proven learning strategies, that you can call upon without adding "courses" either online or in the classroom, exist. At the same time, all three rely on e-Learning for efficient, cost-effective implementation.

Problem-based and scenario-based learning

Two of the key strategies for improving productivity involve altering the design of learning interventions in order to make use of problem-based learning and scenarios. These are low-cost methods that you can well support through Web 2.0 technology.

Problem-based learning (PBL) is a student-centered strategy involving collaboration and reflection. The instructor's role becomes one of facilitation and guidance. You can support the entire process by using a discussion board, perhaps supplemented with a wiki and Web conferencing. This could be a good solution for improving the performance of project teams. PBL is a simple strategy, and it takes some planning before implementation. If you are not familiar with PBL, or lack experience with it, there are a number of resources available on the Web. A good place to start is the overview provided by McMaster University, where the technique originated: <http://chemeng.mcmaster.ca/pbl/pbl.htm>.

Scenario-based learning (SBL) may be more familiar to practitioners who have produced asynchronous e-Learning applications. It is a good approach that can use low-cost PowerPoint slide decks to place learners in various situations where they must apply relevant knowledge and skills in order to resolve issues or challenges. The PowerPoints provide the learner with choices at key points, and then give feedback based on what the learner did. Like PBL, SBL requires planning and careful consideration of the scenario presentation, and crafting of the choices and feedback that the learner sees. This is a far larger topic than I can address here. Until we run a tutorial article, University College London provides guidelines and a very good example at <http://www.ucl.ac.uk/learningtechnology/content/sbl/>.

Immersive Learning Simulations (ILS)

If you have the resources to support it, including infrastructure and software, Immersive Learning Simulations offer another way to take learning out of the "course context" and put it online. ILS can be either low-fidelity or high-fidelity. Low-fidelity ILS includes such applications as spreadsheet-based system simulations. High-fidelity ILS can be expensive if you have to develop them in-house, or if the simulation requires custom development, but you can also use Web-based generic simulations for many skill sets. These are available for developing soft skills for project and team leaders, retail sales staff, customer service representatives, and many others.

Help other departments realize faster returns on investment thru training

When things get tough in the economy, organizations look for ways to improve internal efficiencies. Many business units, especially Information Technology (IT), manufacturing, and distribution, will turn to smaller projects that they can complete quickly, and that will provide a return in under a year. There is a performance support / training / learning / change management component to many of these projects. You must have an internal network, as well as a nimble response, to find out about these opportunities, to get involved in them, and to provide the kind of results that will prove your value.

You also want to look for capital investments or other major initiatives that you can support, in order to make them pay back faster. IT initiatives would be the most typical example, but look for opportunities in operations or production as well.

Be visible!

To meet the requirement for an internal network, you must make yourself visible. This goes somewhat counter to the instinctive response that many people adopt, which is to keep their heads down and to try to be invisible. The key is making yourself visible in the right way, which is by asking for information about the business (not about "training needs"), uncovering pain, and offering solutions that take the pain away. In other words, become an internal productivity consultant.

You can somewhat reduce the risk of being visible by allying yourself with internal clients with whom you have a good working history, and by networking appropriately. Ideally, you will also have people in the organization who will recommend you to decision-makers as a resource.

Manage your own business prudently

No matter how connected to the business of your organization you are, it won't do any good if your own house isn't in order. This means:

Social applications can extend your reach and help you communicate with learners. They can also help learners communicate and collaborate with each other.

- Making the best use of your existing systems and resources
- Innovating
- Scanning the environment

Here's a quick run-through of ideas in these areas.

Maximize what you have

Maximize your mileage from software you already own. You may find that there are features and capabilities that you have not previously made full use of. You may also find that you can upgrade software you are currently using to a newer version, rather than changing to a new product. If your current product is simply not going to provide the functionality you require, consider an Open Source application instead of buying a new application.

Minimize the impact of your programs on infrastructure requirements. At the same time, be ready to use any infrastructure that others add as another channel for delivery (e.g., mobile phones and other devices).

If available, use hosted Web 2.0 software to support development without adding a new software license. Google Docs (<http://docs.google.com>), Zoho Personal (<http://zoho.com>), and Myudutu (<http://www.myudutu.com>) are examples of this group of tools.

Another way to get the most from what you have is to get tough with vendors. Renegotiate license agreements. Negotiate free tailoring of applications. Everything is negotiable, especially now.

Finally, user groups, both local and online, are a great way to discover new ways to use your current software. These groups can also be a source of templates that will shorten your development time, information about freelance developers who understand e-Learning, and examples of innovative applications.

Innovate

As Web 2.0 grows and matures, there are more ways than ever to get out of the box with your e-Learning offerings. Of course, you can use social Web applications, from Twitter and Facebook to YouTube and Photobucket. Use wikis for basic knowledge management and performance support, and tap into your users and learners to create the content that fills the wikis. Social applications can extend your reach and help you communicate with learners. They can also help learners communicate and collaborate with each other. Don't forget that online productivity suites, such as Google Docs and Zoho (mentioned above), provide capability for multiple users to collaborate.

Synchronous e-Learning (also known as "Webinars" and "Virtual Classrooms") is an obvious solution for reduced travel budgets. Success requires foresight, planning, staffing (a producer to help the presenters) and practice. Learn from the e-Learning Guild's free eBooks on the topic:



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While it won't work for every purpose, consider creating video clips for rapid response. Videos, even produced in-house with hand-held cameras, can work extremely well for situations in which a simple "show-me" or demonstration is sufficient. You can place them on YouTube, Photobucket, Kyte, and any number of other free video hosting sites. The only downside is finding sites that your company policy does not block.

Environmental scanning

At DevLearn '08, Tim O'Reilly advised us to "watch the Alpha Geeks – look for people who appear to be doing magic, and ask them how they do it." I call this environmental scanning, and it's a good idea to increase the amount of it that you do. "Alpha Geeks" also include the people who do more magic than anyone else: vendors and consultants. You can pick up on new business models, find new ways to use technology, and spot emerging standards and best practices. Here are some of my favorite scanning methods:

- Pay attention to vendor product announcements, online demos, etc.,
- Take advantage online of social networks, blogs, and The Guild's Community Connections,
- Whenever possible, attend technology-related events and trade shows, especially those in your city,
- If you can do it at all, come to Annual Gathering 2009 and DevLearn 2009, and
- Read everything you can get your hands on, including magazines like *Fast Company* and *Wired*.

As you scan, watch for competition among vendors – new products, new technology, and new value propositions – which can be the keys to strategies that will support you during and after the recession.

Network with others

Even though technology dominates many e-Learning discussions, it's still the case that this is a business by, of, and about human beings. In that regard, nothing that you do is more important than reaching out and making new connections with other people.

Earlier, I mentioned that you should establish alliances with your internal customers. As you do this, set up your own "advisory boards" (or as some call them, "Power Circles"). You should have advisory boards inside and outside your organization, and especially

among your customers (however you define "customers"). Pick people for your boards who have connections, and who can do you some good, not just people who will tell you what they think you want to hear.

LinkedIn, Twitter, Facebook

These social networks are a great way to leverage your time and effort. Use them to find people who are executing successful initiatives to deal with challenges. Ask what others are doing. If worse comes to worst, these are also valuable elements in a job search.


The eLearning Guild

Make use of your Guild membership – especially your Member Plus. If you aren't a Member Plus, consider upgrading to it. If you aren't already a full Member of The Guild, check your company policy about reimbursement for memberships. Guild membership gives you access to a number of benefits. In addition to Learning Solutions, you also receive the use of the Jobs Board and Community Connections. As a Member, you are eligible for discounts on the Online Forums and on conferences. You can also claim discounts on books and some University courses. As a Member Plus, you receive free registration at Online Forums, and as a Premium Member you receive free registration at a Guild conference each year.

Closing

If I had to distill the most important points in this article, they would be:

- Don't panic
- Pay attention to what others are doing
- Network, and let others know what you are doing

While recessions are no fun, they are not the end of the world. By elaborating and implementing the ideas in this article that best fit your situation, you will be able to look back on this period as one of the most important in your career. 

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