Cost and Availability Drive Modality Mix

BY CUSHING ANDERSON

CLOs are increasingly trying to apply the right delivery option for the content, audience and environment.

Content, audience and environment: Each plays a role in how learning is delivered. Meanwhile, the content being taught, to whom and with what available tools are factors that continue to evolve.

The economy and the need to conserve cash have trumped the advancement of some newer technologies, but survey results suggest organizations are getting more sophisticated in their choices of modality. Asynchronous e-learning increasingly is seen as the preferred delivery method when training a group with varied skill levels.

Every other month, IDC administers a Web-based survey to *Chief Learning Officer* magazine's Business Intelligence Board (BIB) on a variety of topics to gauge the issues, opportunities and attitudes that make up the diverse role of a senior training executive.

This same survey last year predicted both synchronous and asynchronous delivery modalities to grow in portfolio share, and predicted information and learning technologies (ITL) would decline. Whether this was an uncanny insight into market forces or simply an understanding of the impending market collapse, the BIB CLOs accurately anticipated the changes confirmed in this latest survey.

This month, we examine our annual data on learning modalities and how they are evolving. Nearly 300 BIB respondents shared their thoughts on the appropriate mix of learning delivery.

The Current Mix: Economy Driving Small Shifts

The survey results show CLOs are using a variety of options as part of their current learning delivery mixes. As Figure 1 shows, classroom training represents the delivery option most used, even though the combination of synchronous and asynchronous e-learning represents the most rapidly growing modality. This is consistent with survey results of the past couple of years.

This year's results show a decrease in classroom delivery more in line with 2007 results. A significant number of organizations also are utilizing formal, on-the-job (OJT) training as a key component of their overall education programs.

Individual organizations changed their use of various modalities for reasons ranging from availability to cost and convenience. Cost has driven classroom-based ILT down slightly. Both asynchronous and synchronous e-learning increased, also because of cost, and many organizations increased asynchronous e-learning because of its convenience.

Portable learning technologies did not gain traction as much as we anticipated last year. CLOs attributed this to availability of content and a complete technology solution. Formal OJT training continues be considered an effective delivery option in specific situations.

During the coming year, CLOs expect classroom-based ILT to represent a slightly smaller portion of the delivery portfolio again, primarily because of cost. Both synchronous and asynchronous e-learning will gain portfolio share in most enterprises in reaction to the continued pressure on development budgets. Text-based training, while remaining a relatively modest proportion of most enterprise training programs, continues to be considered a cost-effective and therefore useful option for CLOs.

In spite of the availability of tools and continued research that supports the effectiveness of blended learning, the most significant driver of blended

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DATA POINT

Seventy-one percent describe classroom ILT (C-ILT) as the primary delivery modality for business skills training than describe C-ILT as primary for IT skills training (39 percent).

FIGURE 1: CURRENT MIX OF CLASSROOM AND E-LEARNING

	2009	2008	2007
Classroom	37.5%	39.5%	36.0%
Synchronous e-learning	10.7%	9.3%	9.0%
Asynchronous e-learning	19.7%	17.7%	15.0%
Portable technology	4.2%	5.3%	6.0%
Formal on-the-job	17.6%	18.7%	18.0%
Text-based	5.7%	5.2%	7.0%
Satellite video	1.2%	1.3%	3.0%
Other	3.4%	3.1%	6.0%

(Provide a percentage breakdown of your organization's current training by delivery method)
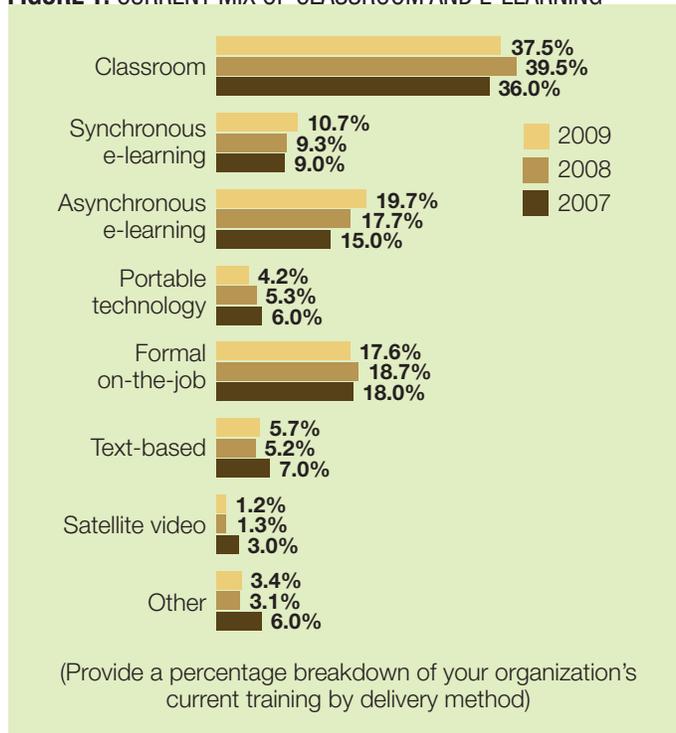
FIGURE 2: MODALITY AND SKILL LEVEL

Modality	Better results with…
Classroom-based ILT	Low skilled
Synchronous e-learning	Higher skilled
Asynchronous e-learning	Higher skilled
Portable technologies	Higher skilled
Formal OJT	Low skilled
Text-based training	Higher skilled

Source: IDC's Learning Modality Survey, 2009

modality remains the availability of various options. This year, like last year, more than 60 percent of CLOs selected the modality for their blended offerings based on the availability of modalities. The value and potential of blended learning continues to be constrained by the availability of content in a variety of modalities.

Matching the Message to the Medium

Enterprises increasingly are trying to align content and delivery modality. CLOs continue to prefer a delivery modality when it represents the most appropriate method for the content. CLOs are trying to apply the right delivery option for the content, audience and environment.

But the economy and its obvious budget pressures have pushed cost ahead of effectiveness. The most frequently selected drivers for both asynchronous and synchronous delivery was the cost savings over classroom-based ILT. And for asynchronous e-learning, flexibility is the other significant driver.

Interestingly, portable technologies are being used by fewer organizations this year than last year. This implies that the benefits of mobility and portability do not currently outweigh the switching costs associated with developing content and deploying a new technology.

Each of these shifts reflects that CLOs are letting the content dictate the delivery options. In some cases this is because it's appropriate; in other cases it is because it is the modality that is available. Clearly, CLOs are increasingly inclined to let the message drive the media.

Delivery for Specific Domains

Preferences for delivery modality by content domain have changed little since 2007. A far greater majority (71 percent) of the BIB describe classroom ILT (C-ILT) as the primary delivery modality for business skills training than describe C-ILT as primary for IT skills training (39 percent).

Business skills courses largely focus on soft skills and lend themselves to face-to-face experiences with instructors and peers. However, because of the wide range of business skills courses from interpersonal to highly procedural, more detailed investigation of these trends might be informative. It is clear CLOs see the

FIGURE 3: PRIMARY DELIVERY FOR IT AND BUSINESS SKILLS
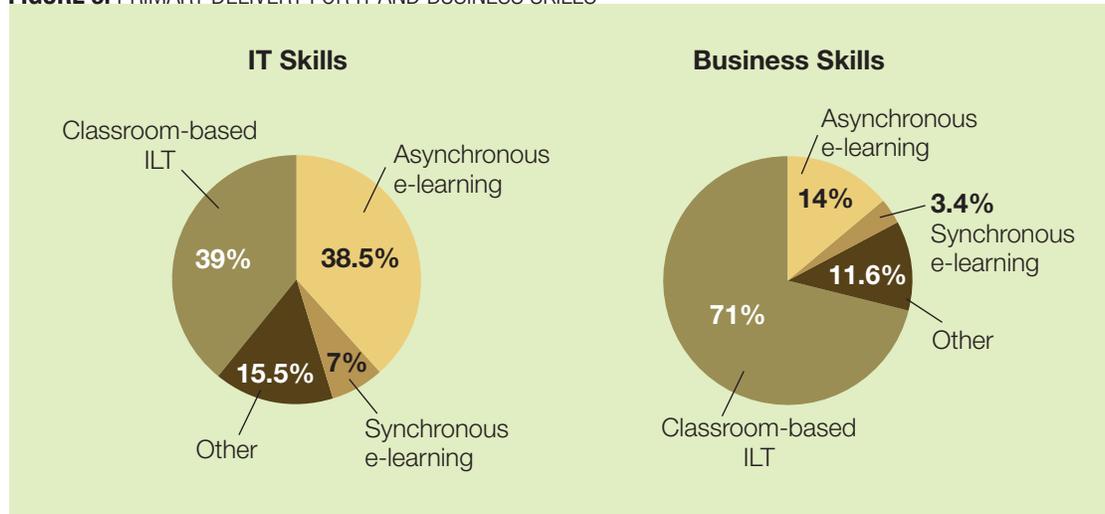
Asynchronous e-learning is increasingly seen as the preferred delivery method when training a group with varied skill levels.

value of classroom instruction when it is an appropriate method for the content to be conveyed.

E-learning, however, is consistently seen as a more appropriate method for delivering IT skills content. About 45 percent of the enterprises selected at least one form of e-learning as the primary delivery method for IT skills training, compared to only 18 percent that selected it as their primary modality for business skills training. Current instructional practices for IT skills tend to emphasize both independent study and practice over shared learning and group work.

At the same time, both research and practice suggest that teaching technology using technology results in effective instruction more often than teaching non-technology content using technology. As collaborative technologies continue to make their way into online instructional modalities, we likely will observe increased value and use of collaborative e-learning experiences when teaching both IT and business skills, reflecting the trend in work itself.

Modality and Skill Level

In every organization, the training team has to account for a mix of skill levels among its workers. Similar to survey responses from 2008, classroom instruction and formal OJT are considered more effective with lower-skilled workers, and e-learning, both synchronous and asynchronous, is considered more effective

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for higher-skilled employees (Figure 2).

Because asynchronous e-learning is consumed at the student's pace, its preference as the modality for higher-skilled employees continues to reflect awareness of CLOs that their audience, content and environment are important determinants of the appropriate delivery selection.

Subtle Changes and Small Steps

It is difficult and often unnecessary for corporate learning programs to change radically. Their constituents evolve only slowly, and organizational priorities are fairly stable. And while the recent economic crisis has forced organizational cost control, the impact on corporate learning has not been for radical transformation.

The delivery mix remains largely consistent even while CLOs increasingly work to match the delivery medium to the content and audience. CLOs will continue to monitor the impact of learning. Matching the delivery to the content and to their students' needs is the primary tool to achieve high impact. **CLO**