

Spending and Staffing Trends for UK Training Organisations

Presented by

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Bersin & Associates**

February 2010

About Us

- **Who We Are**

- Premier research and advisory services firm focused on enterprise learning and talent management

- **Research Areas**

- Enterprise Learning
- Leadership Development
- Performance and Talent Management
- Career and Succession Management
- Strategic HR Systems

- **Offerings**

- In-Depth Studies and Reports
- Research Memberships
- Advisory Consulting



Agenda

- Research Objectives and Methodology
- Key Findings
- Additional Resources
- Q&A

RESEARCH OBJECTIVES & METHODOLOGY

Research Objectives

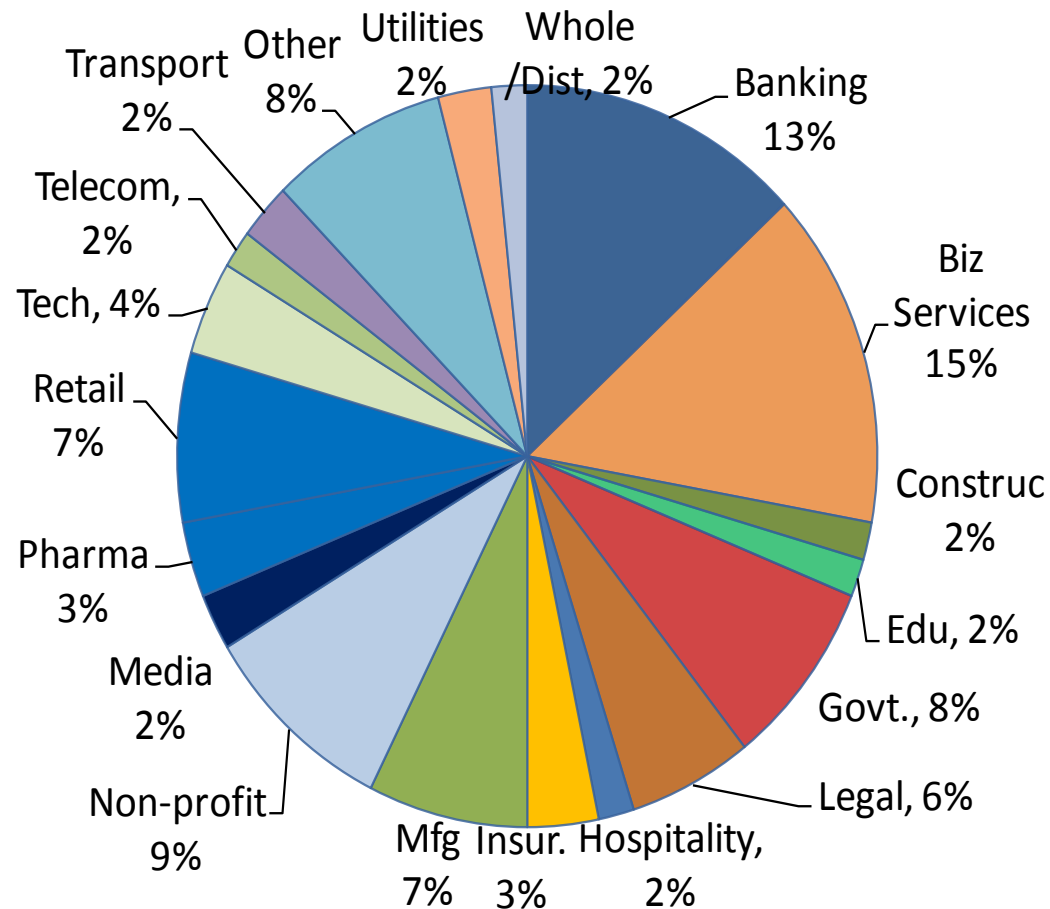
- To provide benchmarking metrics for training & development organisations
- To examine trends over time
 - Spending and staffing
 - Resource allocations
 - Delivery methods
 - Technology usage
 - Outsourcing practices

Key Metrics
Training spending per Learner
Staffing per Learner
Programme Allocations
Hours per Learner
Cost per Student Hour
Delivery Methods
Technology Usage
Outsourcing Practices

Research Depth and Breadth

Broad Reach of Organisations Representing UK Training Market

- Oct-Nov 2009 survey
- 122 U.K organisations
- Company Sizes
 - 47 Small (30-499 ee's)
 - 43 Midsize (500-4,999)
 - 32 Large (5,000+)
- Data weighted to better represent UK market

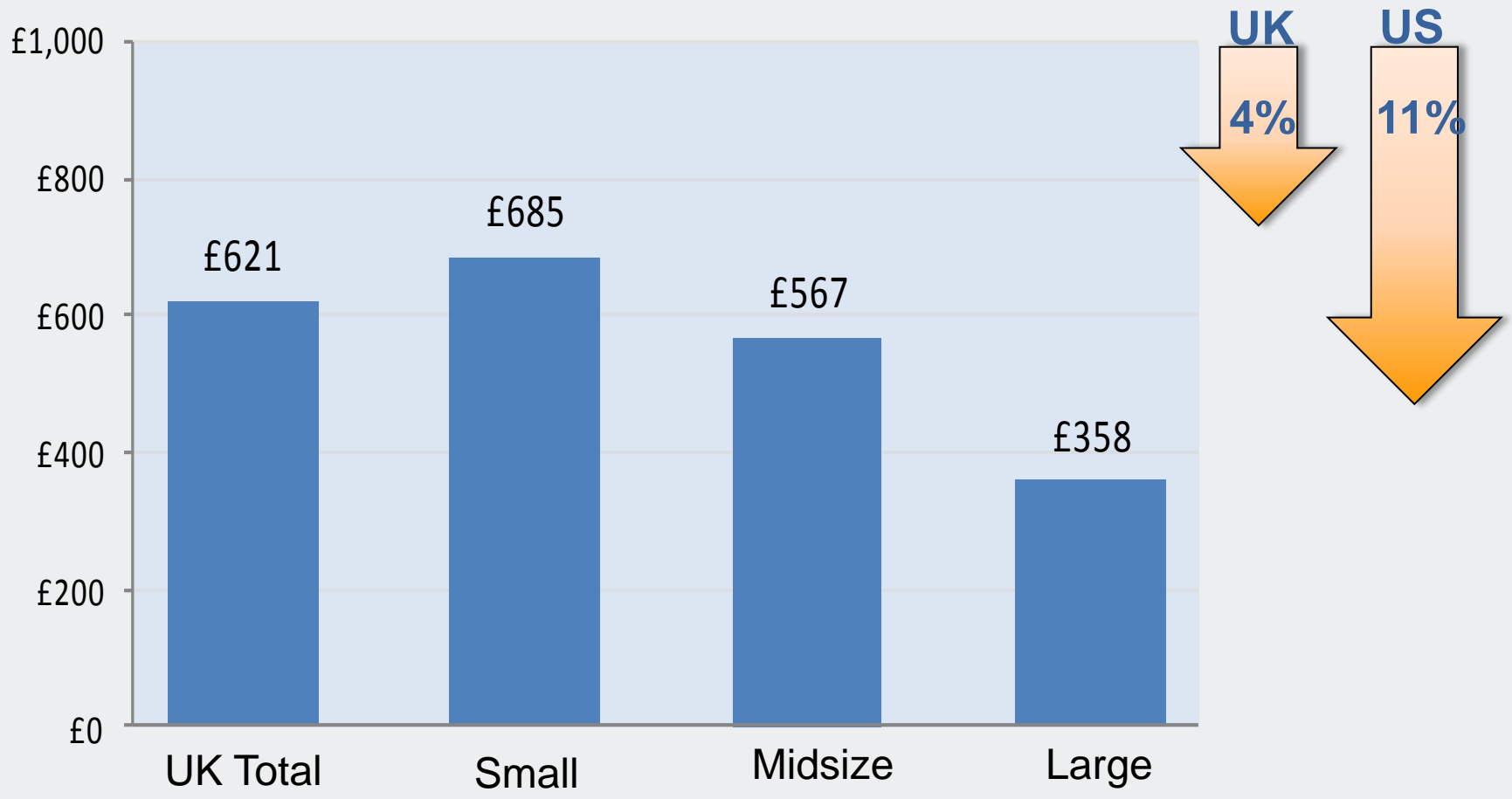


KEY FINDINGS

Training Budgets are Lower

UK firms are taking a measured approach to budget cutting

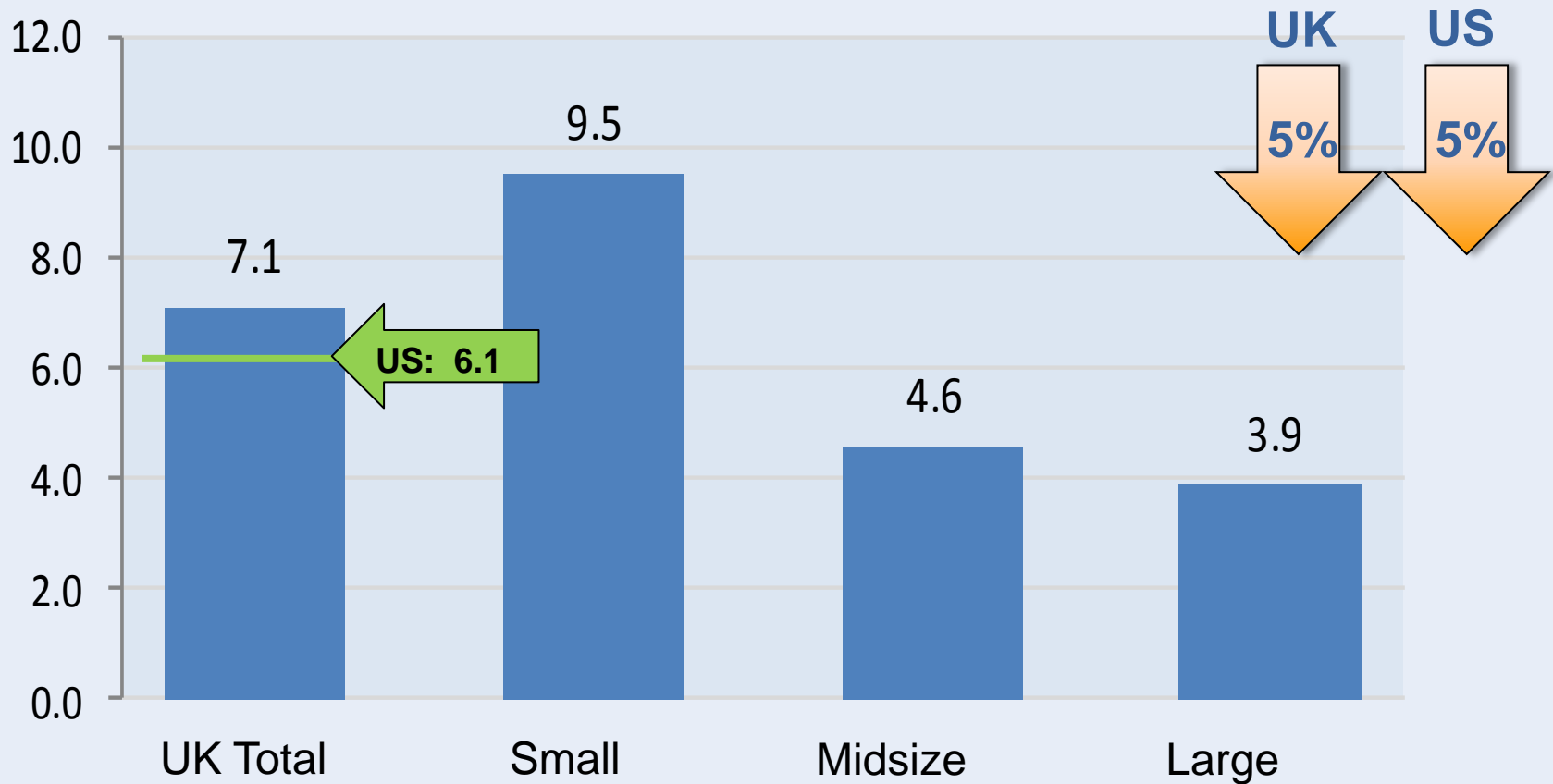
UK training budgets were down 4% in 2009, to £621 per learner.



Training Staffing is Lower

Deepest cuts within large businesses

UK training groups cut 5% of their headcount in 2009 to 7.1 per 1,000 learners.



Centralization at CUNA Mutual

Org Cap Executive

Org Cap Exec Asst

L&D staff reduced from 65 to 40, with new roles defined.

Product and Sales
Technical Learning
Director

Customer Operations
Technical Learning
Director

Learning Support
Senior Manager

- Learning Consultant
 - Learning Consultant
- Areas of Focus Assessment, Curriculum Design, Results*

- Learning Coordinators
- CE and Tuition Assistance
- Contracts and Budget Admin
- LMS/LCMS

- Learning Consultant
 - Learning Consultant
 - Learning Specialist
 - Learning Specialist
- Areas of Focus Course Design, Development Implementation*
Areas of Focus Development, Implementation

Structural Guiding Principles:

- Cost Competitive – reduce FTE charge
- Flexible
- Discipline for Sustainability
- Ease of Doing Business
- Fits in the HR Model
- Project Based Staff Augmentation

- Learning Project Management
- Learning Project Management



Leadership Team

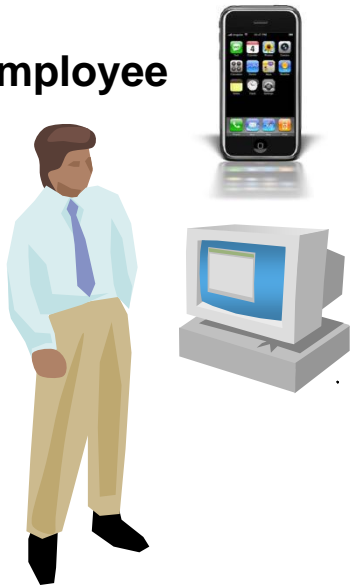


Communities of Practice

A New Set of Roles

Letting Go of "Content Design and Delivery"

Employee



Portfolio Manager

Performance Consultant

Talent Management Expert

Content Manager (Media)

Community Manager (Interactions)

Connection Manager (Directories)

Content Standards
Authoring Tools
Content System(s)
Publishing Tools
Information Architecture

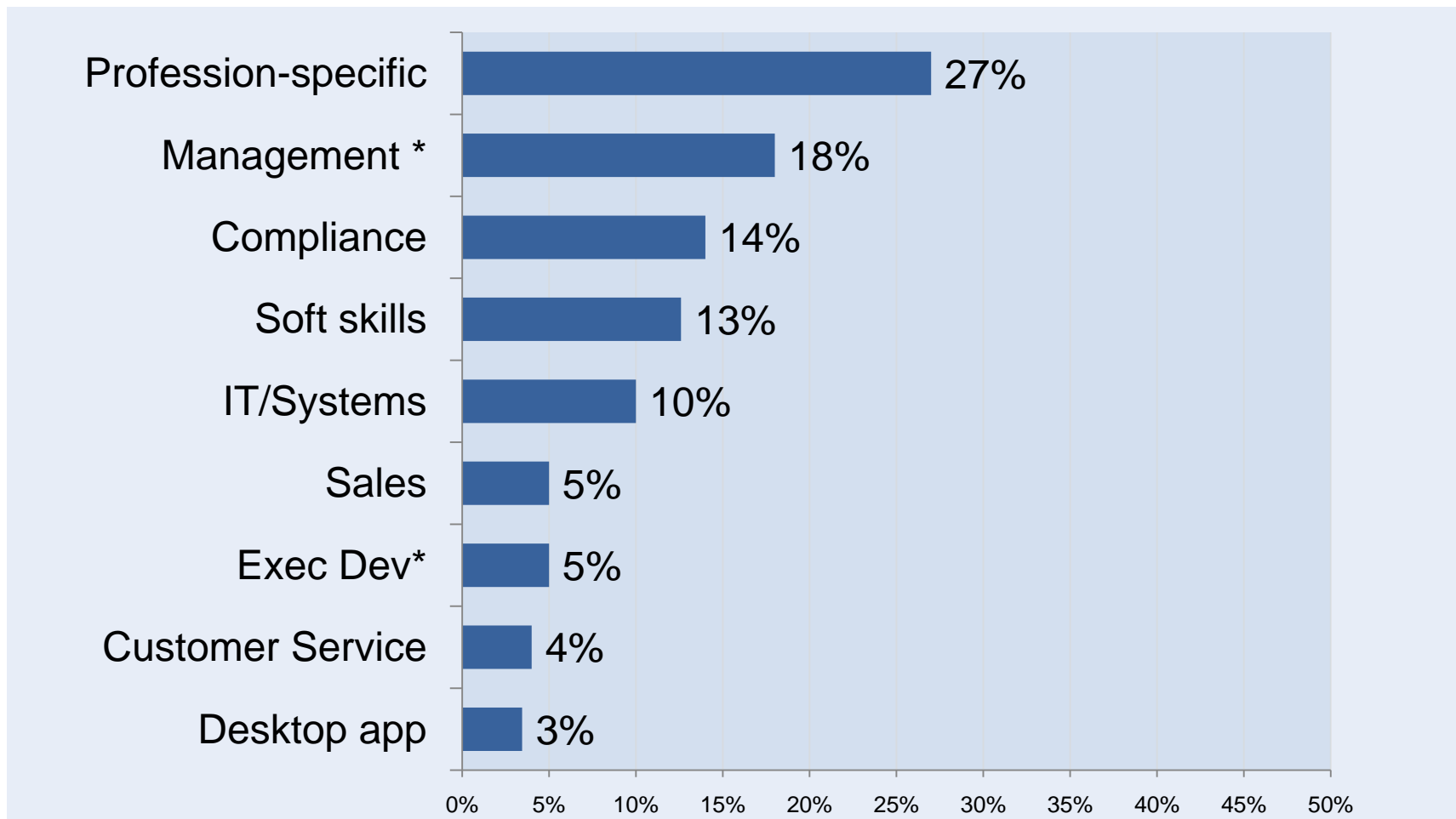
Community Management
Sharing Guidelines
Cultural Reinforcement
Rewards and Feedback
Monitoring and Standards

Systems Integration
Interface to IT standards
Expert Directories

Allocation of Training Budgets

Most spending targets leadership and job-specific training

UK firms spent 23% of training budgets on leadership programs.



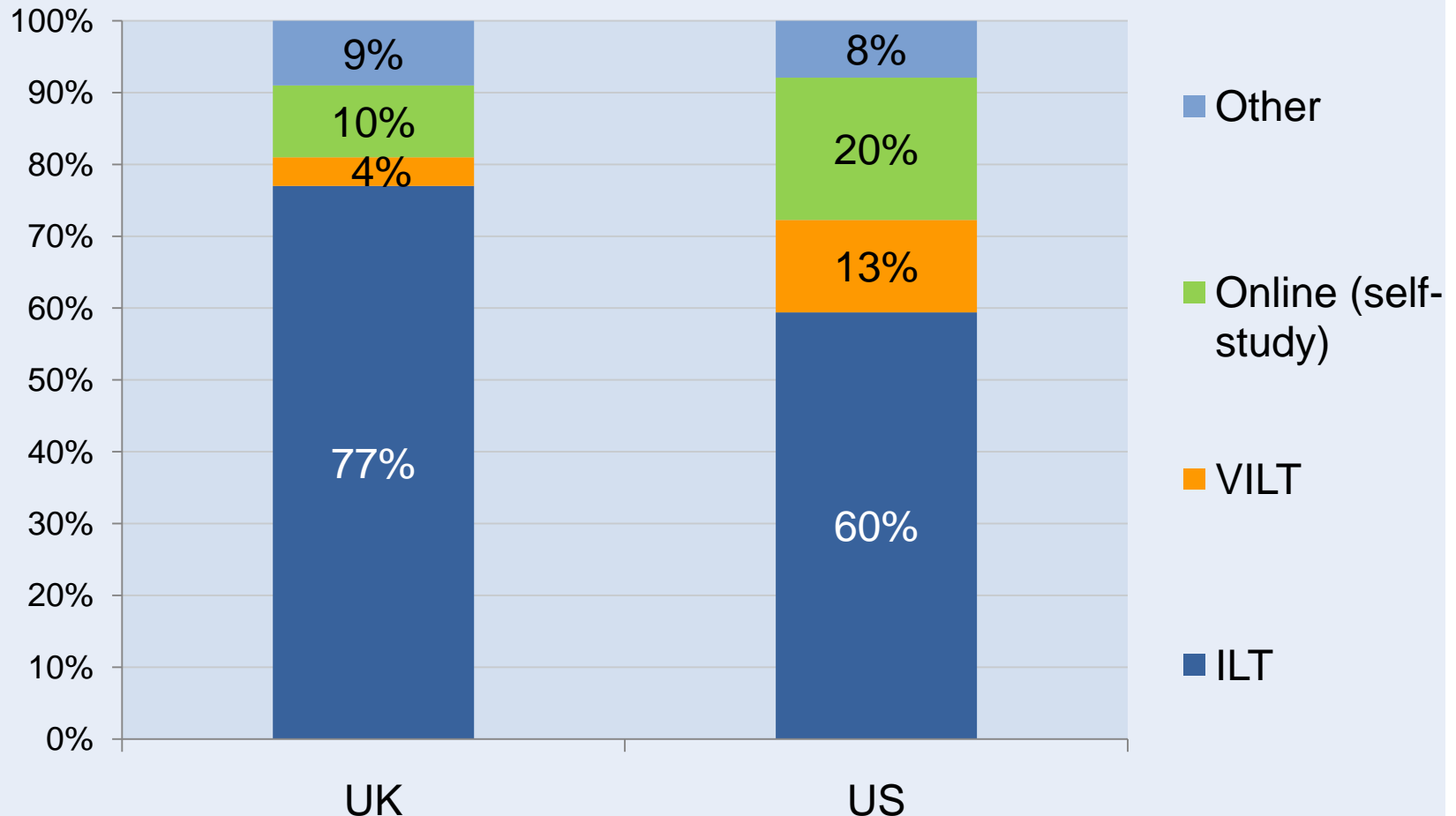
The Training Investment Model



Classroom Training Dominates

UK learners spent 16 hrs. in training, most of which were in the classroom.

Online methods accounted for 14% of UK training hours – half the % in the US.



Managing@Merck

Blended learning program for new managers

4 Main Components over 3 Month Period



**1-day ILT
at kick-off and
conclusion**



**7 online
modules on
basic
management
topics**



**12 virtual classroom
sessions delivered by
internal or external
expert on a specific
topic**

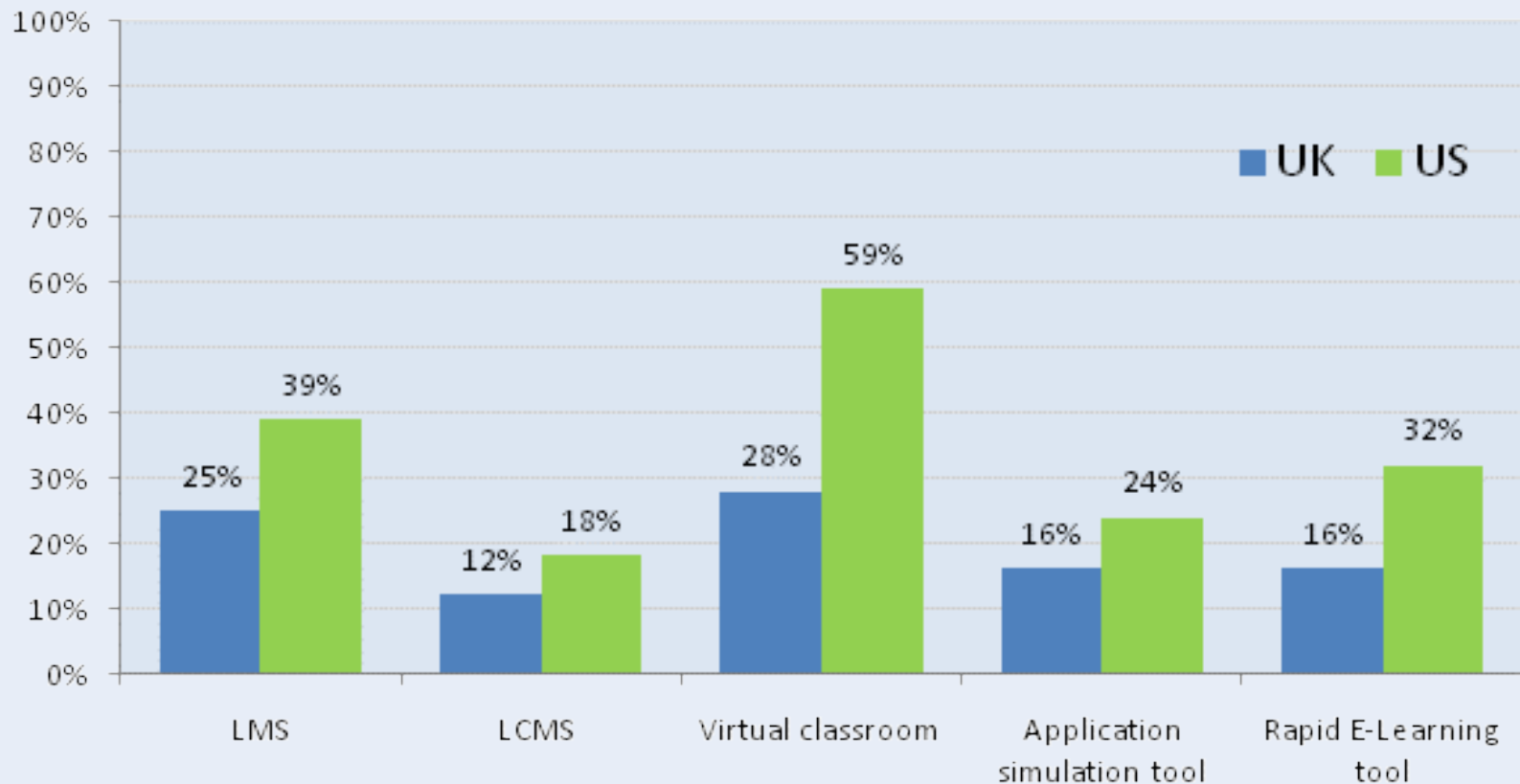


**On-the-job
activities
guided
by manager
or mentor**

Slower Adoption of Learning Tools

UK companies have lower usage of learning tools than in the US.

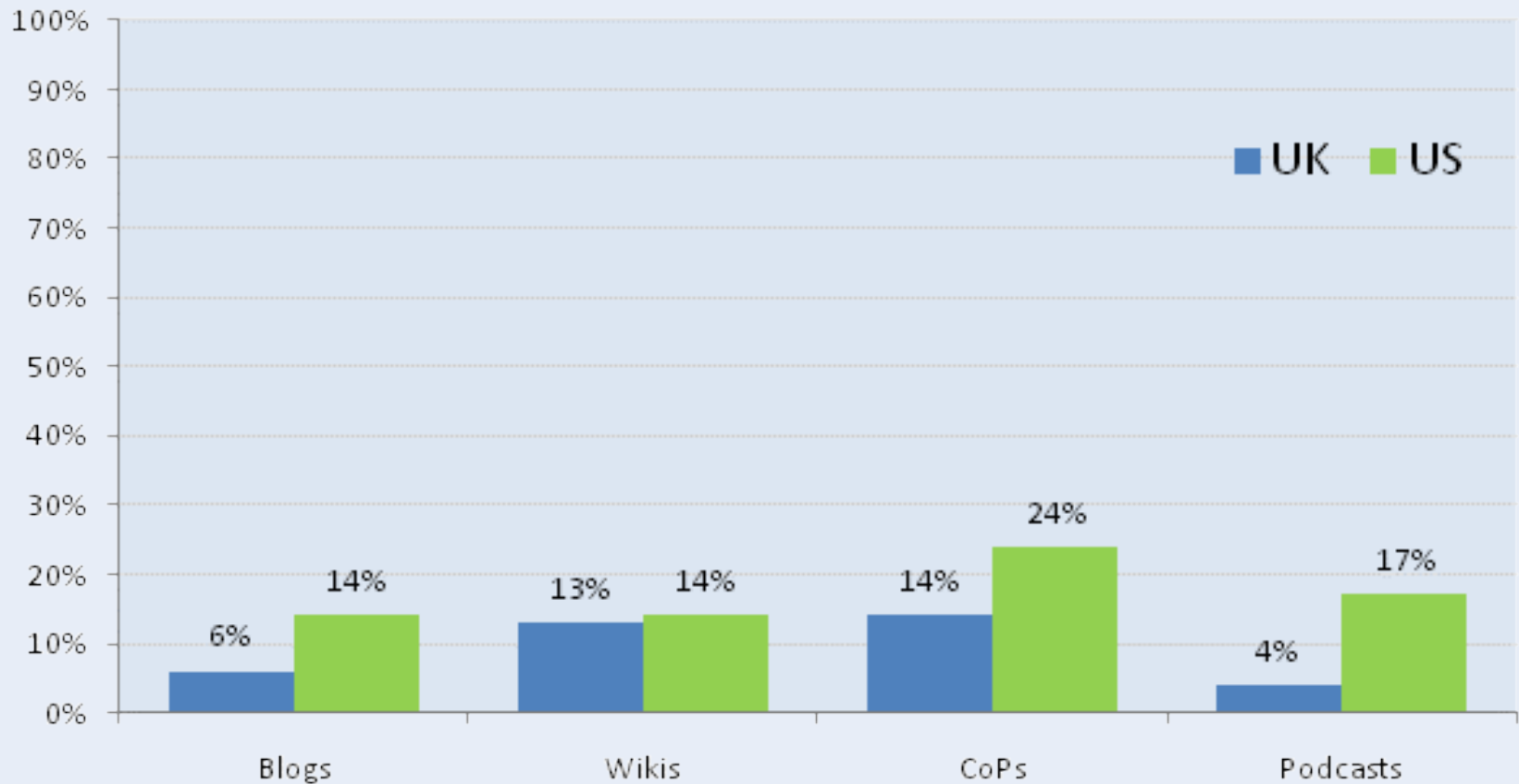
One-quarter of UK companies reported using an LMS in 2009.



Slower Adoption of Informal Tools

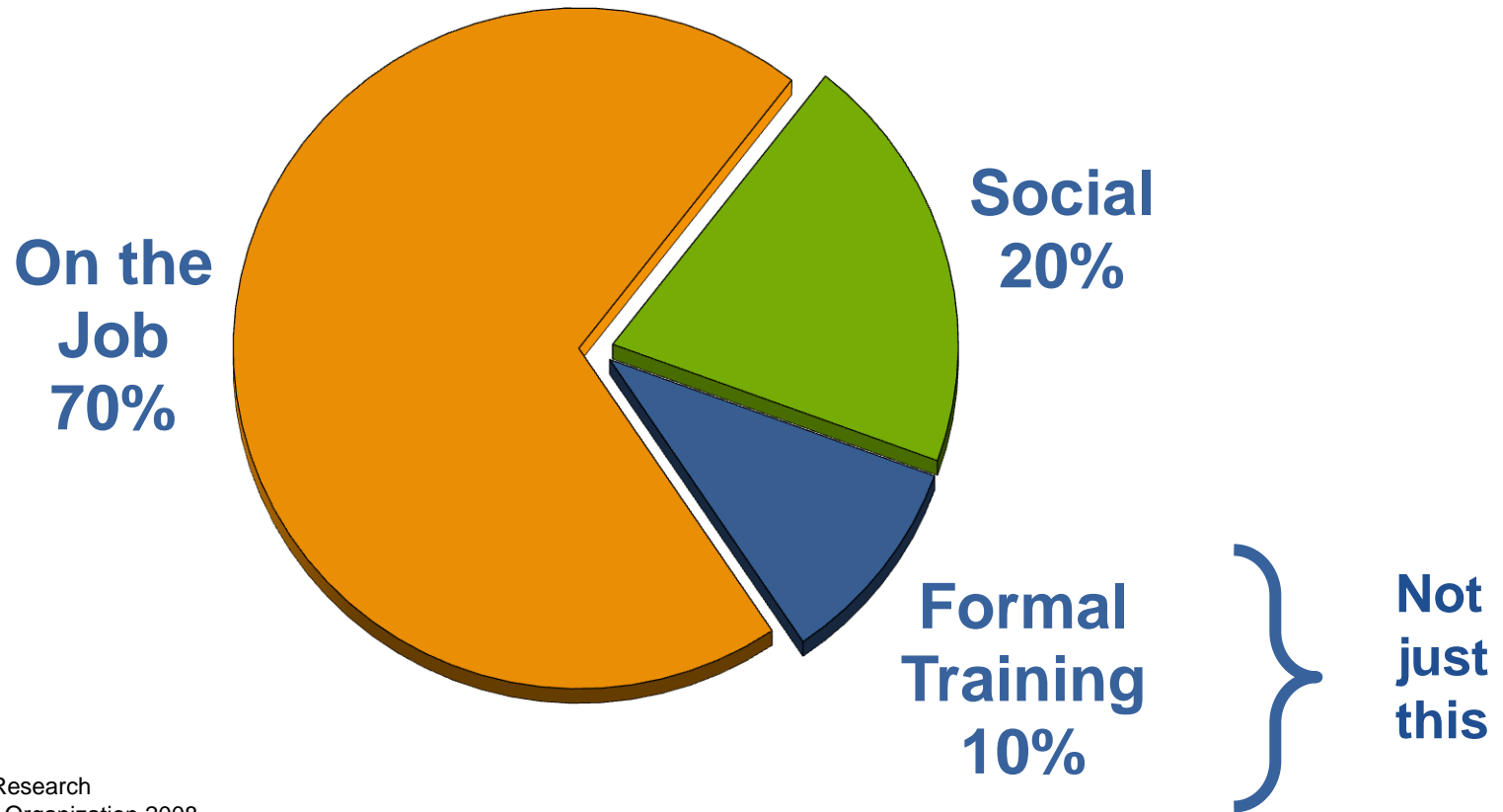
Use of collaborative tools growing quickly in the U.S.

Wikis and CoPs are most popular informal tools in the UK.



The Model We All Believe

We need to optimize this



Bersin & Associates Research
High Impact Learning Organization 2008

Bersin & Associates Enterprise Learning Framework®

Organization, Governance, and Management	Learning Programs		Leadership Development	Career Development	Onboarding	Customer Service	Project and Process	Customer Education	Systems	
			Management	Technical Professional	Compliance	Sales	Product Knowledge	Channel Training	IT Skills	
	Audiences & Environment		Jobs	Roles	Competencies	Proficiencies	Preferences	Demographics	Geographies	Business Problems
	Approaches	Formal	On-Demand			Informal		Embedded		
						Social				
			Instructor Led Training Virtual Classroom Games Simulations Testing & Evaluation E-Learning	E-Learning Search Books, Articles Videos Podcasts Learning/Knowledge Portals			Wikis, Blogs, Forums Expert Directories Social Networks Communities of Practice Conferences & Colloquium Coaching & Mentoring		Performance Support Feedback Rotational Assignments After Action Reviews Quality Circles Development Planning	
Disciplines		Performance Consulting Instructional Designs	Information Architecture Knowledge Management	Content Development Program Management	Change Management Community Management	Measurement & Evaluation Business Intelligence				
Tools & Technology		LMS, LCMS Learning Portals Talent Mgt. Systems	Content Development Content Management	Collaboration Social Networking	Rich Media Mobile	Assessment Search, Tagging	Performance Support Virtual Classroom	Reporting and Analytics Measurement Systems		
Culture		Executive Support Learning integrated With Business Planning	Development Planning Knowledge Sharing	Performance and Talent Management Customer Listening	Innovation Programs Mentoring and Knowledge Sharing	Employee Feedback Learning from Mistakes				
Learning Architecture										

BT's Dare2Share

Figure 63: Dare2Share – Viewing Content

Viewing Learning Content

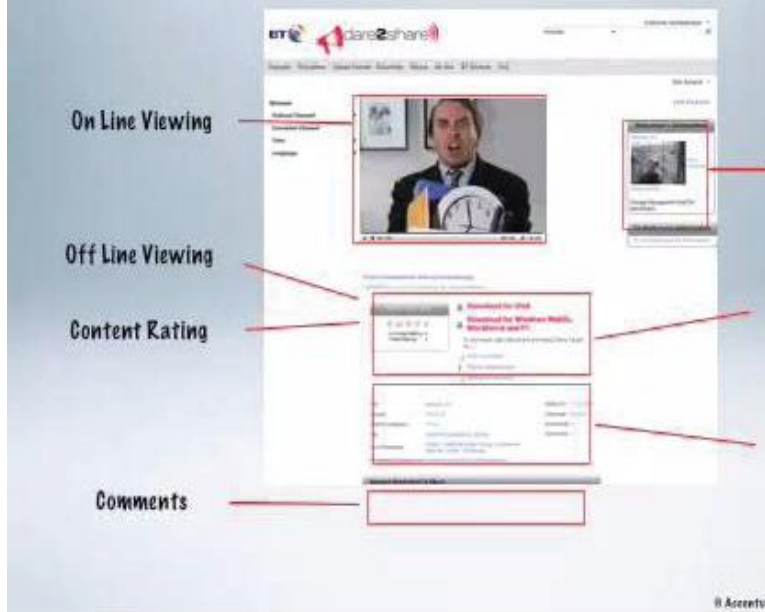


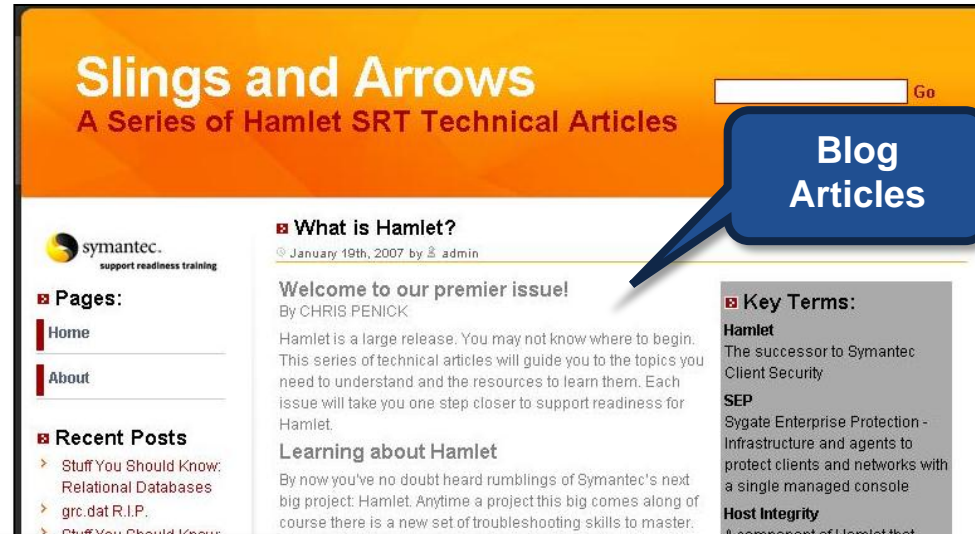
Figure 64: Dare2Share – Discussing Content

Discussing Learning Content



Informal Learning at Product Launch

- Experts write blogs
- Wikis used for continuous support
- Portal to manage resources



Slings and Arrows
A Series of Hamlet SRT Technical Articles

What is Hamlet?
January 19th, 2007 by admin

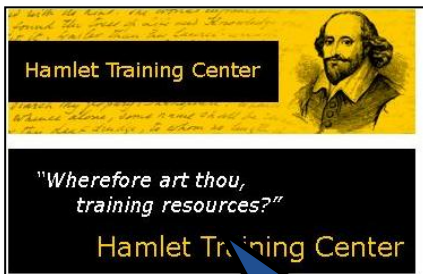
Welcome to our premier issue!
By CHRIS PENICK

Hamlet is a large release. You may not know where to begin. This series of technical articles will guide you to the topics you need to understand and the resources to learn them. Each issue will take you one step closer to support readiness for Hamlet.

Learning about Hamlet
By now you've no doubt heard rumblings of Symantec's next big project: Hamlet. Anytime a project this big comes along of course there is a new set of troubleshooting skills to master.

Key Terms:
Hamlet
The successor to Symantec Client Security
SEP
Symantec Enterprise Protection - Infrastructure and agents to protect clients and networks with a single managed console
Host Integrity
A component of Hamlet that performs endpoint compliance checks on a client
SNAC
Symantec Network Access Control - An appliance designed to work with client agents to protect network resources
VLAN
Virtual Local Area Network - a method of creating independent logical networks within a physical network
SEPM
Symantec Endpoint Protection Manager - The main management console for Hamlet
Questions? Comments?
If you have any questions or suggestions for future issues, contact SRT Project Manager Jeff Seeman at

Blog Articles

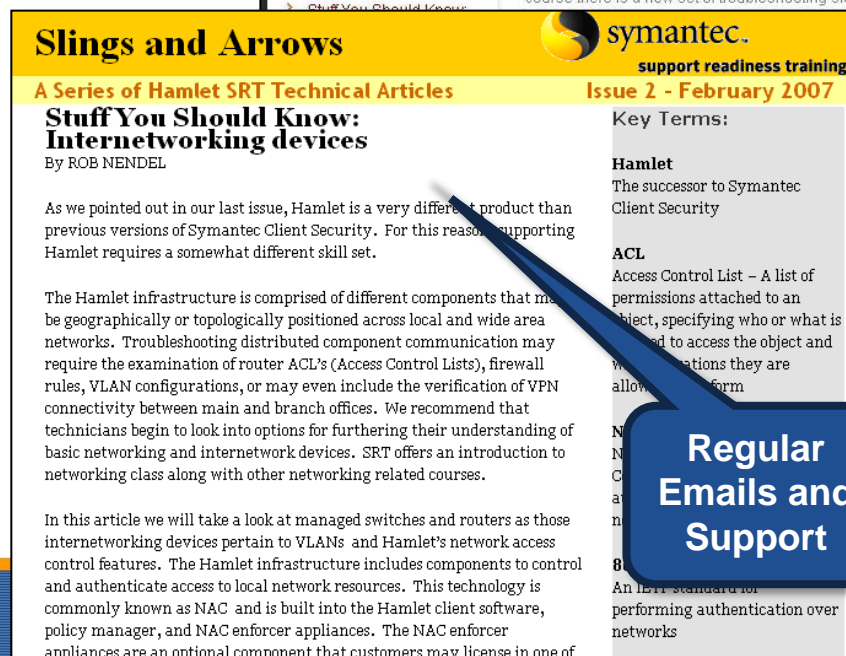


Hamlet Training Center

"Wherefore art thou, training resources?"

Hamlet Training Center

Program Portal(s)



Slings and Arrows
A Series of Hamlet SRT Technical Articles

Issue 2 - February 2007

Stuff You Should Know: Internetworking devices
By ROB NENDEL

As we pointed out in our last issue, Hamlet is a very different product than previous versions of Symantec Client Security. For this reason, supporting Hamlet requires a somewhat different skill set.

The Hamlet infrastructure is comprised of different components that may be geographically or topologically positioned across local and wide area networks. Troubleshooting distributed component communication may require the examination of router ACL's (Access Control Lists), firewall rules, VLAN configurations, or may even include the verification of VPN connectivity between main and branch offices. We recommend that technicians begin to look into options for furthering their understanding of basic networking and internetwork devices. SRT offers an introduction to networking class along with other networking related courses.

In this article we will take a look at managed switches and routers as those internetworking devices pertain to VLANs and Hamlet's network access control features. The Hamlet infrastructure includes components to control and authenticate access to local network resources. This technology is commonly known as NAC and is built into the Hamlet client software, policy manager, and NAC enforcer appliances. The NAC enforcer appliances are an optional component that customers may license in one of

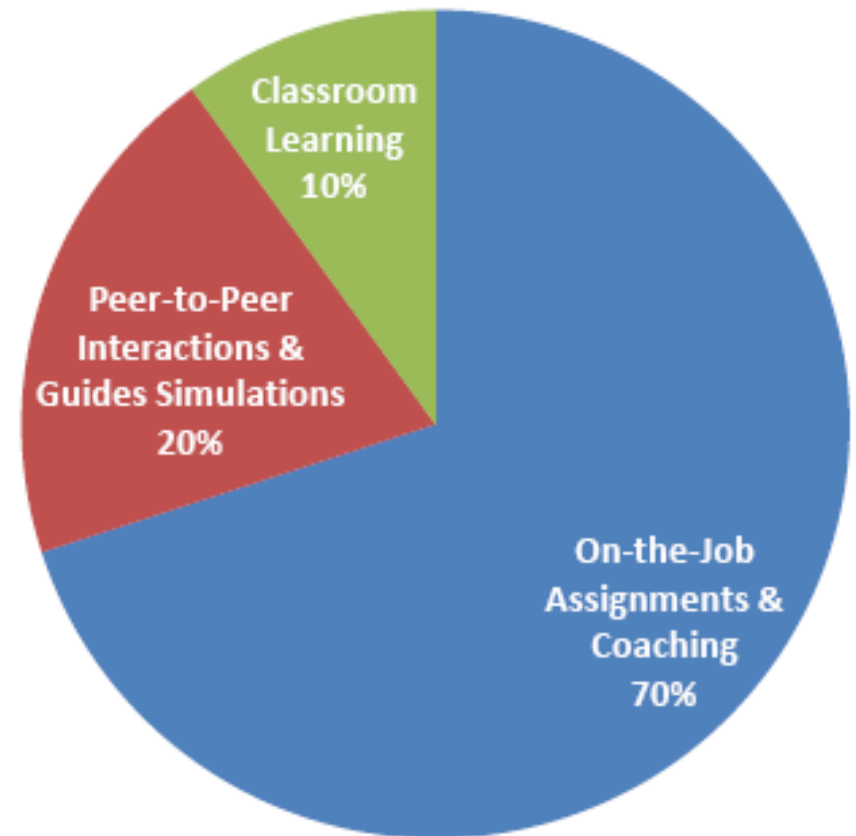
Key Terms:
Hamlet
The successor to Symantec Client Security
ACL
Access Control List - A list of permissions attached to an object, specifying who or what is allowed to access the object and what operations they are allowed to perform
NAC
Network Access Control
SNAC
Symantec Network Access Control
VLAN
Virtual Local Area Network
SEPM
Symantec Endpoint Protection Manager
Questions? Comments?
If you have any questions or suggestions for future issues, contact SRT Project Manager Jeff Seeman at

Regular Emails and Support

Nationwide: J2EE FastTrack

Formalizing informal learning elements

- Integrated program (13 to 15 weeks) focused on multiple skill sets
- Mix of classroom, job assignments, simulations, coaching, and evaluation
- Structured opportunities for experiential work and collaboration



Nationwide: J2EE FastTrack Schedule

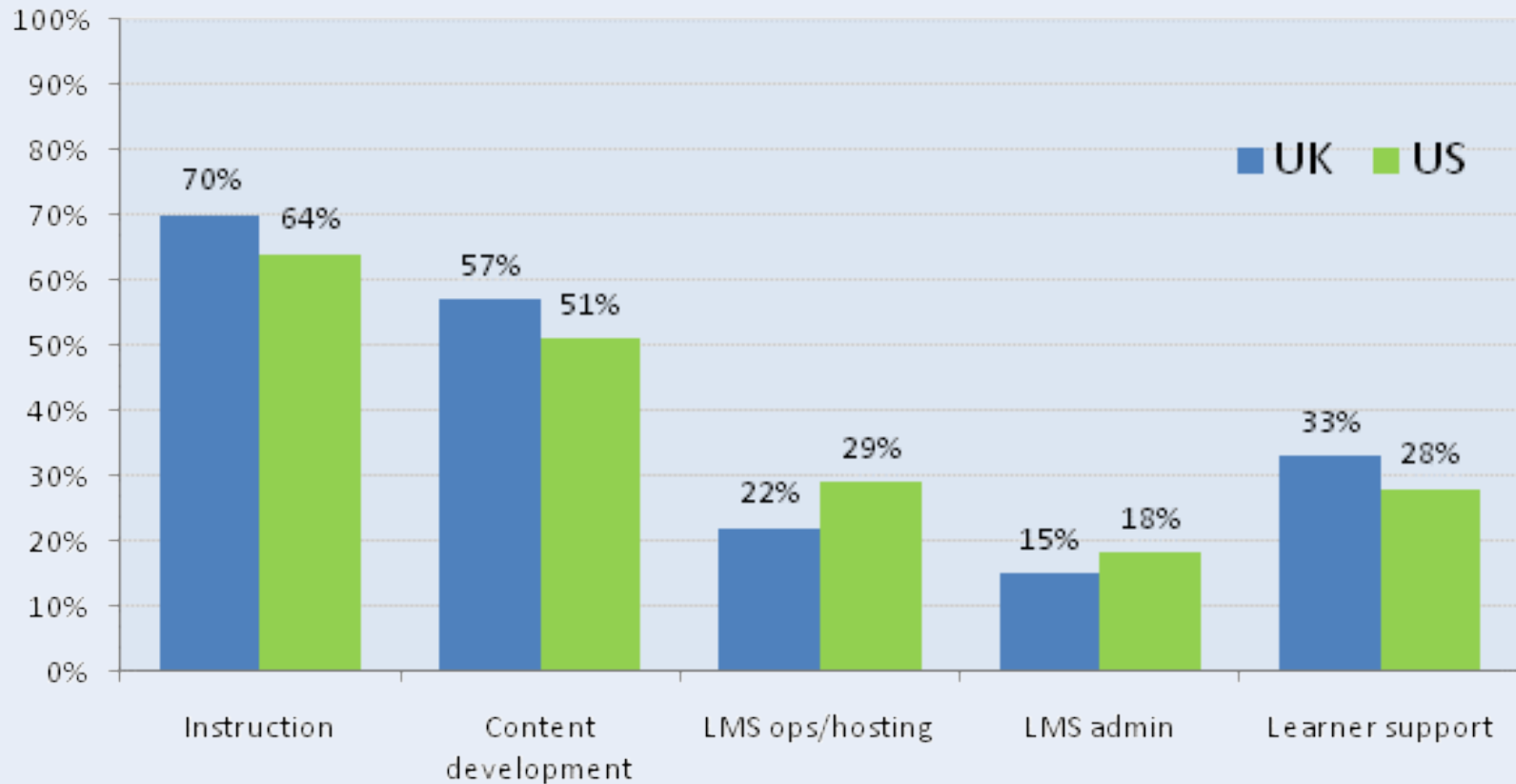
Week Of:	Week 1 July 7	Week 2 July 14	Week 3 July 21	Week 4 July 28	Week 5 August 4	Week 6 August 11	Week 7 August 18
Monday	ILT classes		Assignment #1 - OOAD	On-the-job assignments	RAD		Assignment #3 - J2EE Essentials
Tuesday	OOAD training 8:30 to 4:30	Java Programming 8:30 to 4:30	On-Site Expert M. Ramsey	8:30 - 4:30 On-site experts D. Demmon, B. Stephens	Team Mtg	J2EE Essentials	On-Site Expert M Ramsey F Lamantia 8:30 - 4:30
Wednesday	Team Meeting Daily if needed 4:30 - 5:15	Team Meeting Daily if needed 4:30 - 5:00	Team Mtg 4:30 - 5:00 M & W 4:30 - 4:45 F	Team Meeting 4:30 - 5:15 M & W 4:30 - 4:45 F	XML Overview	Team Mtg 5 - 5:15 (if needed) T & Th	Web Services 8 - 12:30
Thursday			JUnit Maven Continuous Integration (Cruise) 8 - 5	NW WA 1:30 - 4:30		Review sessions 10 pm (if needed)	Assignment #3 -- J2EE Essentials
Friday	Subversion training		Assignment 2 -- Java Programming 8:30 - 4:30	OOAD Review 8:30 - 2:30	Java Programming Reviews		Security 9 - 12:30
	OOAD Assignment			log4J 2:30 - 4:30			Assignment #3 -- J2EE Essentials

Legend	Training Classes -Majors	Training Classes -Minors	Assignments	Assignment Reviews	Final Tests & Assignment
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External Providers

Heavy outsourcing of content development and instruction

Over half of UK firms used external instructors & content developers in 2009.

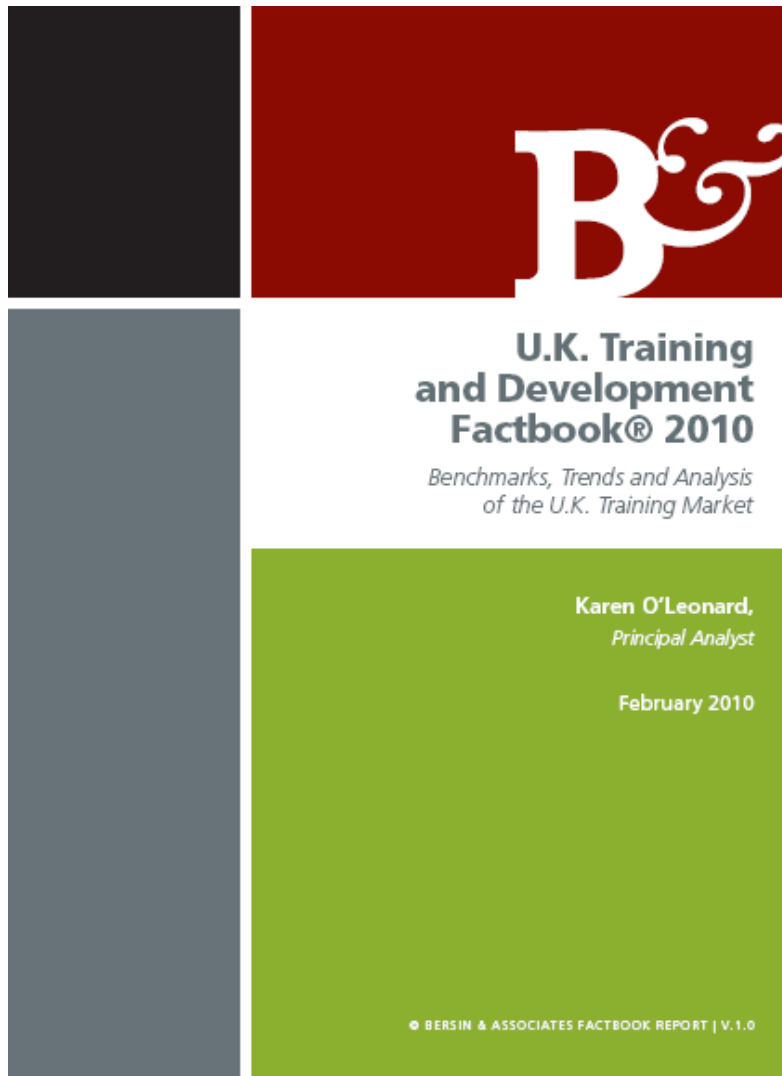


Recap of Major Themes

- Centralisation and restructuring
 - Transforming the role of L&D
- Blended approaches
 - Online methods
 - Informal learning
- Manager as the lynchpin
 - Creating a coaching culture
- Assessing value
 - Blend of qualitative and quantitative metrics

ADDITIONAL RESOURCES

UK Training & Development Factbook



- Report will be available at www.bersin.com
- 122 UK organisations
- Data broken out by company size
- Includes comparisons with U.S. data and trends

Key Metrics

L&D Spending & Staffing	Learning Technology Usage
Spending per learner	LMS infrastructure and installation
L&D staff to learner ratio	LCMS
Training staff payroll spending	Rapid E-Learning tools
Learning technology spending	Application Simulation tools
Spending by program area	Virtual Classroom tools
Spending by employee type	Informal learning tools
Training Volume and Delivery	Learning Outsourcing
Student hours per learner	Custom content development
Cost per student hour consumed	Instruction/facilitation
Training delivery methods	LMS administration
Use of structured coaching	LMS operations
Use of structured collaboration	Learner support

More Resources www.berstin.com

- ***Corporate Learning Factbook : U.S. 2010***
- ***The High Impact Learning Organization***
- ***High Impact Learning Practices***
- ***Talent Management Factbook 2009***
- ***Leadership Development Factbook 2009***

Bersin & Associates Research Membership

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- Network with global, best practice organizations
- Hundreds of case studies in all major industries
- Decision support models and tools
- Benchmarking metrics
- Annual IMPACT conference

<http://www.bersin.com/membership>

Research Library ▶
Enterprise Learning
▪ Organization & Governance
▪ Learning Programs
▪ Content Development
▪ Learning Measurement
▪ Learning Technology
▪ Informal Learning
Talent Management
▪ Talent Strategy
▪ Workforce Planning
▪ Performance Management
▪ Leadership Development
▪ Succession Management
▪ Competency Management
▪ Sourcing & Recruiting
▪ Talent Mgmt. Systems
✔ Trial Research

IMPACT 2010



The banner features a navigation menu with links for Overview, Agenda, Registration, Speakers, Hotel, Demo Center, and Testimonials. The main heading reads "The Premier Executive Event for Learning and Talent Management". Below this, there is a photograph of three professionals in business attire. To the right of the photo, there is promotional text about the event's focus on talent management and a "Register now and save" button with an envelope icon.

2010
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Resort & Golf Club
St. Petersburg, Florida

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Program details will be coming soon. But don't wait. Register now and take advantage of early-bird discounts.

 Register now and save

IMPACT 2010 Conference

April 6-8, 2010

St. Petersburg,
Florida

*Hope to see you
there!*

More information at:
<http://impact.berstin.com/>

Q&A