

D2.2 Needs assessment for future professional training in Europe

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TIME2LEARN

D2.2 Needs assessment for future professional training in Europe - Appendices

Time2Learn Questionnaire

1) About your organisation

1.1) Where is your organisation based ? Please specify a country :

- Europe •
- North America •
- South America
- Eastern Asia •
- Near East •
- Africa

If your organisation is located in Europe, please specify where :

- Belgium •
- Denmark
- Germany
- Spain
- France •
- Italy
- Luxembourg
- Netherlands
- Austria
- Portugal
- Finland
- Sweden
- United Kingdom
- Greece
- Ireland
- Other

1.2) How would you classify your organisation ?

- University, College of Higher/Further Education or equivalent
- Public vocational education & training organisation
- Voluntary or social organisation
- Private training company
- Private organisation (any sector) with internal training services
- Private organisation (any sector) with external training services
- Organisation specialised in producing training content/tools
- Other

1.3) Which of the following subject areas is the main activity of your company ?

- Bank/Insurance
- Consulting / law
- Information technologies

Industry	Health	Food
Public sector	Services	Other

1.4) Approximately how many people are employed in your organisation ?

<20	20-49	50-99	100-249
250-499	500-499	1000+	

2) E-learning in your organisation

2.1) Are you a purchaser and/or user of e-learning ?

Only user	Both
Only purchaser	Neither (never used e-learning)

2.2) E-learning users

2.2.1) In which subject area does your company use elearning ?
(several choices possible)

Information technology/computing	Language learning	Sales/marketing	Management
Teamwork	New product/service training	Other	

2.2.2) Is e-learning related to the production work of your company ?

No (i.e. generic language teaching, generic Microsoft Office training ...)	Yes (i.e. teaching of the brand management of your company, teaching of the features of your company's products ...)
--	--

2.2.3) Please indicate the category of employees involved in e-learning courses :

Management	Sales force	Administrative staff	Engineer
Specialised worker	Non-specialised workers	Other	

2.2.4) Please specify whether e-learning is supplied by your company or by an external e-learning supplier :

Internal	External	Both
----------	----------	------

2.2.5) Do you use specific hardware and / or software for e-learning ?

No, basic computer are used with web browser	Yes, specific software is installed & used on computers	Specific hardware is used (i.e. camera for videoconferences)
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2.2.6) Please indicate where the learning took place :

At your desk	Other place within the company	By the supplier of the training
At home	Other	

2.2.7) Please specify when e-learning occurs :

At specific date & time	Any when
-------------------------	----------

2.2.8) Does the e-learning happen with a teacher ?

Never	Yes, synchronous access (video conference, telephone...)	Yes, asynchronous access (video streaming, possibility to ask a question per e-mail / one a voice mail)
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2.2.9) Is there any interactivity with people in your e-learning courses ?

No	Yes, with other students	Yes, with teachers
----	--------------------------	--------------------

2.2.10) What are the means for people interactivity used in your e-learning courses ?

- | | | |
|-----------------|------------------|---------------|
| Videoconference | Telephone speech | Telephone SMS |
| Mailing list | Web-forums | e-mail |
| Other | | |

2.2.11) After the learning, do you still have access to the resources ?

- | | | |
|-------|------|-----------------------------|
| Yes ? | No ? | Only for specific courses ? |
|-------|------|-----------------------------|

If Yes, which type of access ?

- | | | |
|------------------------------------|-------------------|----------|
| Links to web sites (inc. intranet) | On your hard disk | On paper |
|------------------------------------|-------------------|----------|

2.2.12) Is e-learning assessed ?

- | | | |
|---|---|----|
| Yes, automatically (Multiple Choice Questionnaire...) | Yes, by a teacher who receives the work | No |
|---|---|----|

2.2.13) In your company, does e-learning lead to a diploma ?

- | | |
|-----|----|
| Yes | No |
|-----|----|

2.2.14) Are e-trainings tailor-made to your needs ?

- | | |
|-----|---------------------|
| Yes | No, generic courses |
|-----|---------------------|

2.2.15) What is the main advantage of e-learning in your opinion ?

It reduces training time	Training can be delivered at any time	It improves information retention
It enforces the quality of learning content	It offers the access to tailored courses	Other (explain)

2.2.16) What is the main disadvantage of e-learning ?

Not enough human interaction	Cannot be delivered when needed	Cannot be delivered where needed
Need to be trained to the tool first, uneasy use	Not tailored to my needs	Other (explain)

2.3) E-learning purchasers

2.3.1) Choose your currency (further questions will be answered using this currency) :

Euro US Dollar

2.3.2) What is the estimated current yearly expenditure of your company to be related with e-learning ?

<50 000	50 000-100 000	100 000-500 000
500 000-1 million	1 million +	Don't know

2.3.3) What is the share of this expenditure to be related with e-learning content (i.e. e-learning courses) :

<10 %	50-70 %
10-30 %	70 % +
30-50 %	Don't know

2.3.4) What is the current share of global training expenditure of your organisation to be related with e-learning :

<10 %	50-70 %
10-30 %	70 % +
30-50 %	Don't know

2.3.5) When did your company invested in e-learning ?

This year	Last year	2 years ago	3 years ago	Before
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2.3.6) For which employees category did your company purchase e-learning products ?

Management	Engineer	Other
Sales force	Specialised worker	
Administration staff	Non specialised worker	

2.3.7) Why has your organisation decided to invest in e-learning ?

To reduce training costs	To improve the employees autonomy
To improve training efficiency (better information retention)	To enable training partnerships with other companies
To implement a global training policy within your company	Other

2.3.8) What determined your organisation to buy your actual e-learning solution ?

The price	A partnership with the provider
The features of the solution	Other
Possibility to have a technical assistance	

2.3.9) Have your organisation purchased packaged e-learning products ? (i.e. e learning courses + software)

Yes

No

2.3.10) The e-learning product of your company is :

Tailored by the provider according to your company's needs

A generic e-learning product

2.3.11) When e-learning courses have to be updated :

Your company manages the updating

Updating is implemented by the e-learning supplier

There is no updating

2.3.12) Are there e-learning specialised employees in your organisation (i.e. who would be responsible for the day to day e-learning management) ?

Yes

No

2.3.13) Is your e-learning system integrated with a global HR system ?

Yes

No

2.3.14) In the future, how will the share of elearning in training expenditure of your company evolve?

It will rise in a dramatic way

It will decrease steadily

It will rise steadily

It will decrease in a dramatic way

It will remain stable

Don't know

2.3.15) What is the forecasted share expenditure of your company to be related with e-learning ?

Within 2 years :

10 %	51-70 %
11-30 %	> 70 %
31-50 %	Don't know

Within 5 years :

10 %	51-70 %
11-30 %	> 70 %
31-50 %	Don't know

2.3.16) What is the main disadvantage of e-learning ?

Not enough human interaction	Cannot be delivered when needed	Cannot be delivered where needed
Need to train the learner to the tool first, uneasy use	Not tailored to the company's/learners' needs	Too high fixed costs
Too high variable costs		Other (explain)

2.3.17) What future technical evolution is likely to further raise your interest for e-learning ?

mLearning (accessing via next generation mobile phones)	High bandwidth allowing videoconference, video on demand...	Availability of generic e-learning brokers allowing to browse multiple providers' catalogues at once
Use of virtual reality rooms/helmets	Ability to adapt immediately the training to the level of the trainee	Complete integration of HR and e-learning/knowledge management
		Other (feel free !)

3) Neither user nor purchaser of e-learning at this time

3.1) What is the main reason why your organisation doesn't use e-learning ?

- It costs too much
- Culture of the company
- No answer to our specific demand
- Lack of time
- No training needs
- Problem of infrastructure
- No Internet
- Other

3.2) Would your company decide to invest in e-learning in the future ?

- Yes
- No

3.3) If yes, when does your organisation plan to invest in e-learning ?

- Within the next year
- Within the next two years
- Within the next three years
- Later
- Don't know

3.4) What would determine your organisation to invest in e-learning in the future ?

- Improvement of e-learning quality
- A cut on e-learning courses and software prices
- Implementation of training partnerships with other companies

4) **The future of e-learning**

Please rate the following hypotheses according to their relevance to your future elearning needs or to raise your interest in e-learning in the future

	Not relevant	Little relevant	Very relevant	Extremely relevant
Hypotheses on fonctionnalities for purchasers of training				
Increased awareness and promotional information on e learning offer (ie pushing information on available training, news, that can be directly used by individuals to get the right training)				
E-learning industry forums freely available and recognized				
Recognising trends and problems in continuing training (getting the information that standard training used in the corporation are evolving (ie offer or demand make them change), that current training is qualified as not sufficient or not efficient by the trainees)				

Recognising qualification needs (ie through the analysis of demanded training within the organization, push the information that there is a general need for training for specific qualification				
off the shelf training (ie go to an online catalogue of training, pick one, pay it, deliver it, all seamlessly)				
transferability & recognition of qualification (ie being able to assess the training value of various providers' content in order to align it with the company's own scale)				
extended enterprise(ie direct access to other companies training, designed to be shared, in order to foster specific co-operations)				
Easier calculation of ROI (ie by assessment or calculation, always include in a given training a ROI calculation module for each trainee)				
Costs management systems (ie intelligent analyses of existing training (groups or individuals ; mode of delivery, costs...) to be able to decide how to optimize the training budget allocation)				
Availability of generic e-learning brokers allowing to browse multiple providers' catalogues at once				
Complete integration of HR and e-learning/knowledge management				
Certified training offer (having all e-learning offer assessed in one global certification scale)				
Existence d'une échelle unique Européenne ou mondiale de certification des cours en ligne				
Hypotheses on staff's access to knowledge on available learning resources				
Proposing new training to individuals on a permanent basis				
Giving individuals an access to complete catalogues of learning resources to chose from				
Customisable professional development schemes available for each individual in the organization (ie competence mapping allowing to know who needs what training at what time and where)				
Interview at regular intervals (ie have elearning systems regularly ask quick questionnaires in order to probe the interests of individuals for specific training)				
On-line staff development consultancy for employees (ie instead of having the system say what training does one need, let each individual find out its own needed training)				
Hypotheses on the physical delivery conditions of e-training				

No restriction to train individual or teams (ie knowing that, at will, either one people or a whole team can be trained on a given subject)				
Deliver the training at any time/any place (ie not having to regroup the trainee at a specific date in a specific place at the office or at the providers' offices)				
Hypotheses on future technologies				
MLearning (ie next generation mobile phones used as medium to deliver e-learning)				
Use of virtual reality rooms/helmets (ie to put the trainee in a "real life" situation)				
High bandwidth for everybody allowing videoconference, video on demand on a standard material (ie PC)				
Easy deployment (ie use of standard software, standard technologies that allow the training to be available without specific developments and investments)				
system integration services (ie managing complex multi-actors project and being able to deliver the training of one provider using another provider LMS)				
No specific investment needed to deliver the training (ie use of standard PC or standard PDA or standard mobile phones without any piece of specific additional hardware or software)				
Hypotheses on LMS and courses' functionalities				
Ability to adapt immediately the training to the level of the trainee (ie the training is able to adapt its level to the perceived level of the trainee)				
Systematic certification (if the successful training leads to a certification, make this process automatic and seamless once the training is completed)				
Customer customisable course (ie e-learning courses are not directive but at specific points ask the trainee what they would particularly like to be trained at)				
Inclusion of corporate knowledge (ie from a standard universally-designed course, being able to easily insert specific knowledge from your corporation)				
Interlocking of learning and working (ie being able to insert the training software into regular operational software in order to propose training and teaching directly adapted to the current work of the employee)				

Time 2 Learn

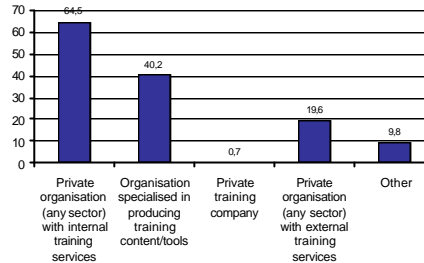
D2.2 Appendices

Characteristics of the organisations

[About your organisation]

1.2) How would you classify your organisation?

	#	%
Private organisation (any sector) with internal training services	178	64,5
Organisation specialised in producing training content/tools	111	40,2
Private training company	2	0,7
Private organisation (any sector) with external training services	54	19,6
Other	27	9,8
Total / answers	276	134,8



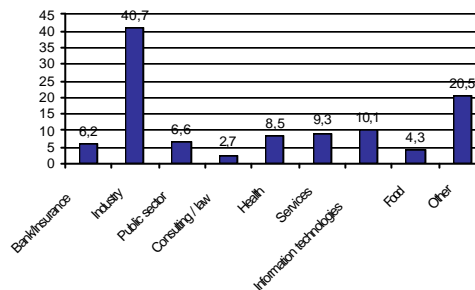
- A great majority of the organisations concerned by the survey are private organisations with internal training services. Our selection of organisations was quite diversified, which means that the results are quite representative of the way training services are provided in the French and German companies.
- About 40% of the organisations interviewed are specialised in producing training content/tools.
- According to the figures, it seems that some companies are organised with both internal and external training services. These kind of companies are typically the ones that can be interested by e-learning solutions.

➤ **65% of the organisations are private ones, with internal training services.**

[About your organisation]

1.3) Which of the following subject areas is the main activity of your company?

	#	%
Bank/Insurance	16	6,2
Industry	105	40,7
Public sector	17	6,6
Consulting / law	7	2,7
Health	22	8,5
Services	24	9,3
Information technologies	26	10,1
Food	11	4,3
Other	53	20,5
Total / answers	258	108,9



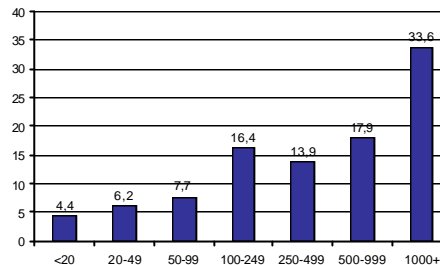
- About 40% of the companies interviewed belong to the industrial sector.
- The companies which accepted to answer to the survey belong to very various sectors, from bank to health or food. This breakdown of the organisations is quite realistic and gives a representative view of the use of e-learning.
- We can note that about 20% of the organisations work in services or technological fields. They must correspond to the organisations specialised in producing training content and tools.

➤ **The selection of companies is quite balanced between industry and tertiary activities.**

[About your organisation]

1.4) Approximately how many people are employed in your organisation?

	#	%
<20	12	4.4
20-49	17	6.2
50-99	21	7.7
100-249	45	16.4
250-499	38	13.9
500-999	49	17.9
1000+	92	33.6
Total	274	100



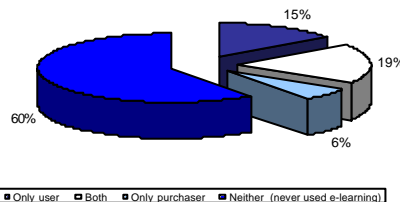
- 34% of the organisations are very big companies or even groups which employ more than 1000 people.
- 30% of the organisations are small and medium companies, which work with 100 to 500 collaborators.
- Only 19% of the organisations have less than 100 employees. Indeed, as we expected to contact human resources directors in the company, it is far more difficult to find human resources department or training department in small companies.

➤ **51% of the companies are very big companies which employ more than 500 people.**

[About your organisation]

2.1) Are you a purchaser and/or user of e-learning?

	#	%
Only user	42	15.1
Both	52	18.7
Only purchaser	17	6.1
Neither (never used e-learning)	167	60.1
Total	278	100



- 60% of the interviewed organisations have never used elearning before, which is the case of a great part of French companies.
- 19% of the directors of the Human Resources Department are at the same time user and purchaser of e-learning. Only 7% of them purchase e-learning and do not use it finally in their own department.
- The other part of the interviewed organisations have already experimented e-learning and can give us an other point of view, which may be more realistic and which may integrate the restraints of this solution.

➤ **60% of the interviewed organisations have never used e-learning before**

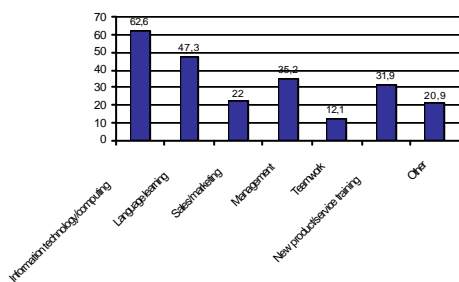
E-learning users

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

[E-learning users]

2.2.1) In which subject area does your company use e-learning?

	#	%
Information technology/computing	57	62.6
Language learning	43	47.3
Sales/marketing	20	22
Management	32	35.2
Teamwork	11	12.1
New product/service training	29	31.9
Other	19	20.9
Total / answers	91	231.9



- About 63% of the companies use elearning solutions in information technology and computing tools. Indeed, employees often need a little training period to feel at ease with their computers. E-learning solutions seem to be a very good solution to learn.
- The second striking result here is the fact that the company which use e-learning tools seem to use them in different subject areas.
- That means that e-learning really starts to complete the traditional training systems in some organisations.
- At the moment, e-learning is especially used for language learning, new product/ service training and management.
- For the moment, elearning is more used to develop individual skills, such as the use of computers or foreign languages, than for trainings related to the activity of the company.

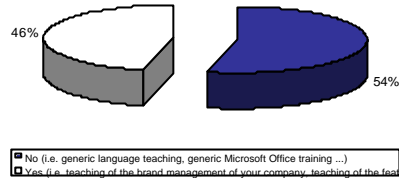
➤ **E-learning is especially used for computing and language learning.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

[E-learning users]

2.2.2) Is e-learning related to the production work of your company?

	#	%
No (i.e. generic language teaching, generic Microsoft Office training...)	45	53,6
Yes (i.e. teaching of the brand management of your company, teaching of the feat)	39	46,4
Total / answers	84	100



- 56% of the users of e-learning resort to these tools for generic training (language, computing...)
- Apparently, e-learning is not used for both types of training. Either it is used for generic training or for an activity related to the production work of the company.

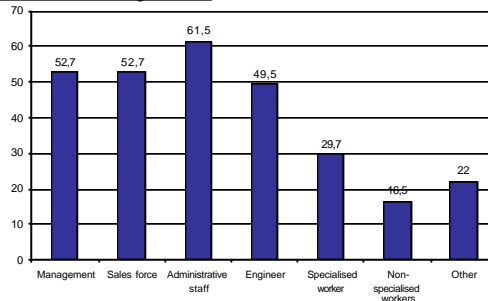
➤ **E-learning is mainly used for generic training and not in relation to the activity of the company.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

[E-learning users]

2.2.3) Please indicate the category of employees involved in e-learning courses?

	#	%
Management	48	52,7
Sales force	48	52,7
Administrative staff	56	61,5
Engineer	45	49,5
Specialised worker	27	29,7
Non-specialised workers	15	16,5
Other	20	22
Total / answers	91	284,6



- The first element to note is the fact that when a company use e-learning, it is not reserved to a certain category of employees, but to several ones.
- Indeed, 4 categories seem to be usually users of e-learning : management, sales force, administrative staff and engineers.
- But we may suppose that the contents of the training are quite different for sales force and administrative staff. That is why training can be related to different fields. Sales force must be interested in sales training or language learning, whereas administrative staff must learn to master computers.

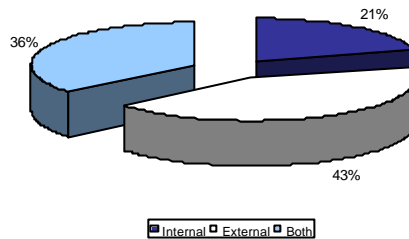
➤ **E-learning is often destined to several categories of employees, especially administrative staff and sales force**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

[E-learning users]

2.2.4) Please specify whether e-learning is supplied by your company or by an external e-learning supplier?

	#	%
Internal	19	20,7
External	40	43,5
Both	33	35,9
Total	92	100



- For 44% of the companies, e-learning is supplied by an external supplier.
- An internal solution may be more difficult to organize, that is why only 21% of the companies have chosen this way.
- A mix of the two solutions could be considered as the results of the diversity of subject and employees involved in e-learning courses. In fact when you use generic language teaching, you can supplied it by yourself.

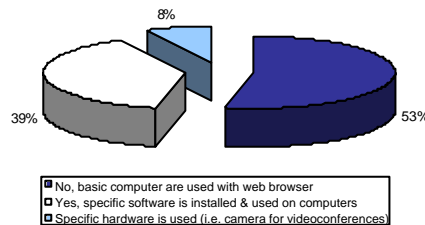
➤ **External supplier is the most common solution in the companies but the content of e-learning allows a mix of internal and external solutions.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

[E-learning users]

2.2.5) Do you use specific hardware and / or software for e-learning?

	#	%
No, basic computer are used with web browser	49	57
Yes, specific software is installed & used on computers	36	41,9
Specific hardware is used (i.e. camera for videoconferences)	7	8,1
Total / answers	86	107



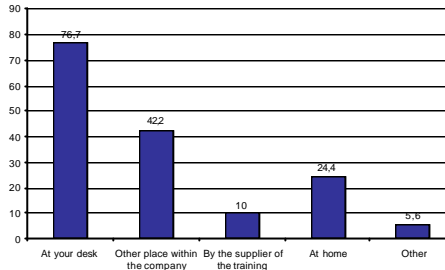
- Only 8% of the companies use specific hardware such as cameras for videoconferences.
- The companies seem to appreciate e-learning for it is not necessary to use specific hardware. Indeed, about 90% of the companies can use e-learning trainings with their usual computers.
- In 53% of the companies, e-learning courses are accessible through the Internet thanks to a web browser on a basic computer.

➤ **53% of the companies use e-learning on basic computers with web browser.**

[E-learning users]

2.2.6) Please indicate where the learning took place

	#	%
At your desk	69	76,7
Other place within the company	38	42,2
By the supplier of the training	9	10
At home	22	24,4
Other	5	5,6
Total / answers	90	158,9



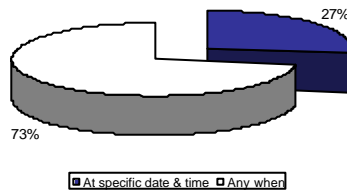
- The learning takes place at the employee's desk in more than 75% of the companies interviewed.
- 42% of the companies use e-learning inside the offices of the company. We may suppose that this phenomenon is due to the necessity to install specific software on the computers of the company, either directly on employees' PC or in specialized rooms.
- About 25% of the learning sessions take place at home. That implies that the employees can bring the e-learning tools at home and use them from their own computer. It can be learning related with the production work of the company but individual learning (language, computing) must be more frequent.

➤ **The learning takes place essentially in the company and especially at your desk**

[E-learning users]

2.2.7) Please specify when e-learning occurs

	#	%
At specific date & time	25	27,2
Any when	67	72,8
Total	92	100



- It is interesting to note that e-learning sessions mostly occur at any time and not at specific date and time.
- It confirms the fact that the employees can choose the moment of their training since they just have to use their computer with a web browser and this mostly occurs at their desk.

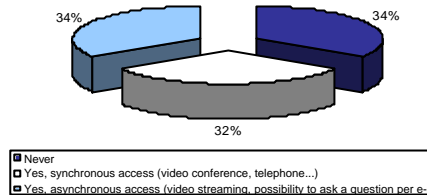
➤ **For 73% of the users, e-learning occurs at no specific date or time.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

[E-learning users]

2.2.8) Does the e-learning happen with a teacher ?

	#	%
Never	33	36,7
Yes, synchronous access (video conference, telephone...)	31	34,4
Yes, asynchronous access (video streaming, possibility to ask a question per e-m)	33	36,7
Total / answers	90	107,8



- Only 34% of the trainings can be carried out without any teacher. To a certain extent this may be related to the trainings that can be done at home.
- In the other cases, when the e-learning takes place with a teacher, it can be indifferently though a synchronous or asynchronous access. This must depend on the equipment of the companies.

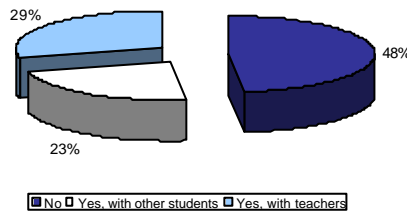
➤ **E-learning takes place with a teacher for 66% of the cases.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

[E-learning users]

2.2.9) Is there any interactivity with people in your e-learning courses ?

	#	%
No	47	52,8
Yes, with other students	22	24,7
Yes, with teachers	28	31,5
Total / answers	89	109



- In 53% of the cases, there is no interactivity with other people in the e-learning courses.
- In the other cases, the interactivity occurs either with other students or with teachers, both in the same proportion.
- It is interesting to note that this interactivity implies that the e-learning occurs at a specific date, when the students and the teachers are available. Or it supposes that discussions by e-mail are possible.

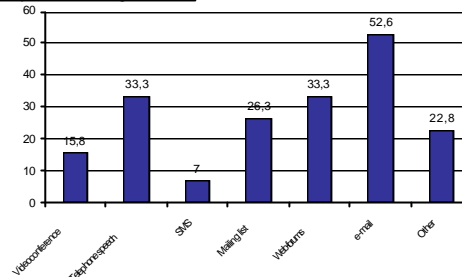
➤ **In 53% of the cases, there is some interactivity with teachers or students.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

[E-learning users]

2.2.10) What are the means for people interactivity used in your e-learning courses?

	#	%
Videoconference	9	15,8
Telephone speech	19	33,3
SMS	4	7
Mailing list	15	26,3
Web-forums	19	33,3
e-mail	30	52,6
Other	13	22,8
Total /answers	57	191,2



- The two means the most used for interactivity are e-mail and web forums.
- The other means are telephone speech or the use of a mailing list.
- The telephone and SMS are not very used, maybe because of their cost, and the fact that, by SMS, you cannot write long messages, ask questions or even receive detailed answers.
- Some people use videoconference, but it is more difficult because the company must be equipped with special televisions, internet connexions, and microphones.

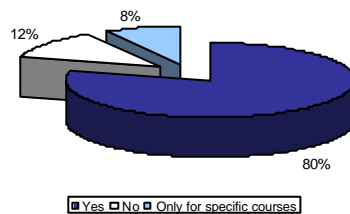
➤ **The most used communicating means are related to the Internet : e-mail, web forums, mailing lists and telephone speech.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

[E-learning users]

2.2.11) After the learning, do you still have access to the resources ?

	#	%
Yes	66	79,5
No	10	12
Only for specific courses	7	8,4
Total	83	100



- A majority of the users still have access to the resources after the learning.
- This must be related to the fact that the employees can choose the moment of their training ; which means that they have access to the resource any when, thanks to their web browser in most cases.
- 7 people out of 83 told us that they had access to the resources only for specific courses, maybe for courses related to the activity of the company. In this case indeed, some documents can be confidential.

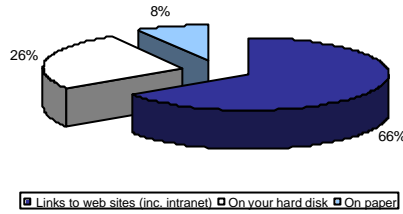
➤ **In 80% of the cases, people still have access to the resources after the learning.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

[E-learning users]

If Yes, which type of access ?

	#	%
Links to web sites (inc. intranet)	55	78,6
On your hard disk	22	31,4
On paper	7	10
Total / answers	70	120



- These figures confirm our last hypothesis : 78% of the people have access to the resources after their training period thanks to their intranet connexion or through links to web sites.
- 31% of the people have also the possibility to save their data on their hard disk and to have it available.
- The fact that the first proposal (links to web sites) is the most used is quite easy to understand. Indeed, once you have access to a document through the Internet, you can save it on your disk and print it. But the paper is not too used because of the cost and because of the problem the file classifying.

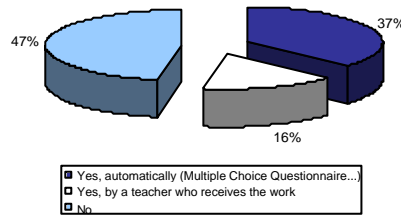
➤ **Web sites seem to be the best way to have access to the resources after the learning.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

[E-learning users]

2.2.12) Is e-learning assessed ?

	#	%
Yes, automatically (Multiple Choice Questionnaire...)	34	38,6
Yes, by a teacher who receives the work	15	17
No	44	50
Total / answers	88	105,7



- In 47% of the cases, e-learning is not assessed, which means that it is more a personal training, with exercises to develop different skills than a compulsory course imposed by the company. Maybe the user can assess himself easily, just verifying his capacity to do the exercises.
- But, in the other cases, two different systems exist : either the user is assessed automatically, that is to say directly through the software, or by a teacher who receives the work. The assessment by teacher occurs only for 16% of the people because it requires the availability of a teacher.

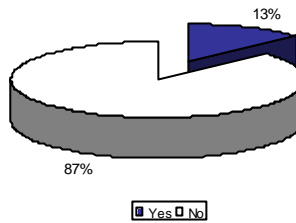
➤ **For 37% of the users, e-learning is assessed automatically.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

[E-learning users]

2.2.13) In your company, does e-learning lead to a diploma ?

	#	%
Yes	12	13.2
No	79	86.8
Total	91	100



- For only 13% of the users, e-learning lead to a diploma inside the company.
- This is not so surprising insofar as only 57% of the trainings are assessed, either automatically or by teachers.
- Maybe awarding diplomas requires the assessment by a teacher quite systematically, in order to give it a real value. This may be a reason why few trainings lead to diplomas.
- Another reason may be that the company just wants to encourage its employees to develop new skills or to complete their training, but without creating a new form of pressure. Moreover, this would imply a new system of assessment in the management of the human resources of the company.

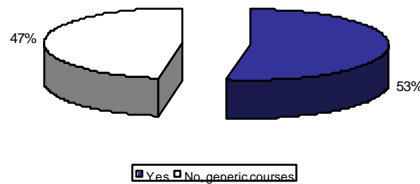
➤ For only 16% of the users, e-learning lead to a diploma.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

[E-learning users]

2.2.14) Are e-trainings tailor-made to your needs ?

	#	%
Yes	49	52.7
No, generic courses	44	47.3
Total / answers	93	100



- 53% of the companies use generic courses, that is to say courses which can be adapted for every company. They must be language or computing courses or even courses on management or marketing.
- 47% of the companies prefer tailor-made courses. This must correspond to very specific needs. For example, a company may train its employees to sell a new product or a new service of the company. In such a case, it is far more efficient to adapt the content of the training to that company.

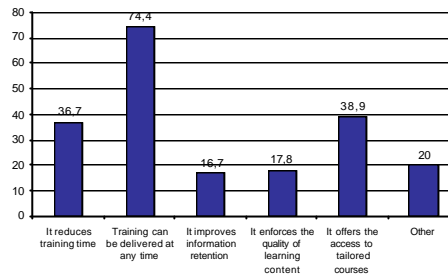
➤ Companies are clearly divided between choosing generic courses or tailor-made trainings.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

[E-learning users]

2.2.15) What is the main advantage of e-learning in your opinion ?

	#	%
It reduces training time	33	36,7
Training can be delivered at any time	67	74,4
It improves information retention	15	16,7
It enforces the quality of learning content	16	17,8
It offers the access to tailored courses	35	38,9
Other	18	20
Total / answers	90	204,4



- 75% of the users explain that the main advantage of e-learning is its flexibility in terms of time. Indeed, we observed earlier that 73% of the people used e-learning any when. It is a real advantage for the companies, because organising sessions with teachers implies to gather people at specific dates.
- The second main advantage is the fact that the trainings can be adapted to the needs of the company. The users appreciate the fact that e-learning offers access to tailor-made courses.

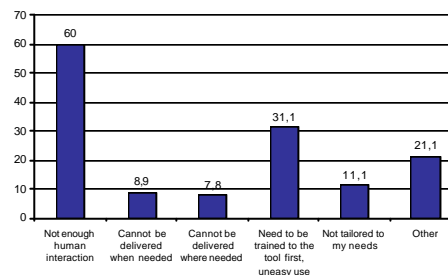
➤ **The main advantage of e-learning is its flexibility : the training can be delivered at any time and can be adapted to the needs of the company.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

[E-learning users]

2.2.16) What is the main disadvantage of e-learning ?

	#	%
Not enough human interaction	54	60
Cannot be delivered when needed	8	8,9
Cannot be delivered where needed	7	7,8
Need to be trained to the tool first, uneasy use	28	31,1
Not tailored to my needs	10	11,1
Other	19	21,1
Total / answers	90	140



- About 60% of the users think that the main disadvantage of e-learning is the lack of human interaction, because the trainings take place just in front of a computer screen.
- The other disadvantage is the fact that some employees are not used to working with specific software and computers. That is why it may be more difficult for them to learn efficiently through e-learning solutions. They first have to be trained to the tool.
- The other disadvantages concern a certain lack of flexibility in terms of use : the necessity to use computers or specific software prevent the companies to deliver the training any when or anywhere.

➤ **For 60% of the users the main disadvantage of e-learning tools is their lack of human interaction.**

[E-learning users]

2.2.15-16) What are the main advantage and disadvantage of e-learning ?

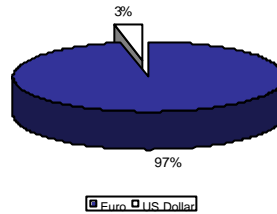
- Advantages : The analysis of the answers «other » shows off only two different ideas. The users often speak about interactivity, flexibility and adaptability of the tools, as proposed in the latter question. But some people also mentioned the simplicity of use, and a cost lower than traditional trainings with teachers.
- Disadvantages :
 - can't be used alone
 - employees are not always motivated
 - employees are reluctant to use computers
 - it's new and people are not used to it
 - lack of responsibility, not an "adult attitude", the worker does not express the will to follow a course
 - lack of adaptability to the needs of the company
 - not enough used badly presented bad advertising: not in the French culture
 - over-training
 - lack of reliability because of few controls
 - too standardized

E-learning purchasers

[E-learning purchasers]

2.3.1) Choose your currency (further questions will be answered using this currency)?

	#	%
Euro	57	96,6
US Dollar	2	3,4
Total	59	100



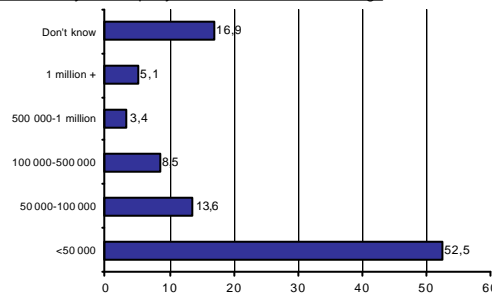
- 97% of the organisations chose Euro. In fact, the interviewed organisations are mainly based in France.

➤ **97% of the organisations chose Euro.**

[E-learning purchasers]

2.3.2) What is the estimated current yearly expenditure of your company to be related with e-learning?

	#	%
<50 000	31	52,5
50 000-100 000	8	13,6
100 000-500 000	5	8,5
500 000-1 million	2	3,4
1 million +	3	5,1
Don't know	10	16,9
Total	59	100



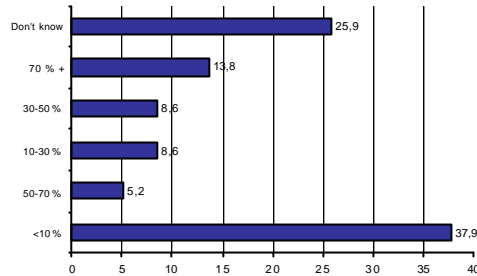
- 53% of the organisations do not spend more than 50 000 Euros on e-learning per year. E-learning could not be considered as a priority to train the employees in the interviewed organisations.
- Only 18% of the organisations spent more than 100 000 Euros on e-learning this year. It underlines that e-learning is not seen as a priority in learning in French companies and e-learning investments are weak.

➤ **The majority of the organisations do not spend more than 50 000 Euros on e-learning this year.**

[E-learning purchasers]

2.3.3) What is the share of this expenditure to be related with e-learning content (i.e. e-learning courses)?

	#	%
<10 %	22	37,9
50-70 %	3	5,2
10-30 %	5	8,6
30-50 %	5	8,6
70% +	8	13,8
Don't know	15	25,9
Total	58	100



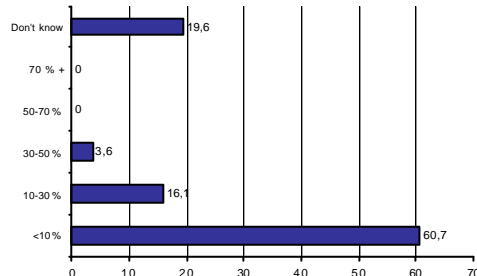
- For 38% of the organisations, the e-learning content represents less than 10% of their expenditure on e-learning. According to the whole investment in e-learning, the figures are very low and raise the question of the indirect cost of this solution.
- Only 14% of the organisations are able to restrain the indirect cost and to really take advantage of this kind of learning for a reasonable cost.

➤ The e-learning content represents a very low part of the e-learning expenditure.

[E-learning purchasers]

2.3.4) What is the current share of global training expenditure of your organisation to be related with e-learning?

	#	%
<10 %	34	60,7
10-30%	9	16,1
30-50%	2	3,6
50-70%	0	0
70% +	0	0
Don't know	11	19,6
Total	56	100



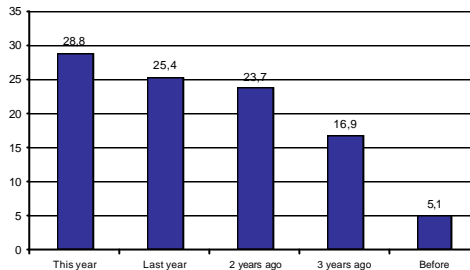
- 61% of the organisations decided to spend less than 10% of their global training expenditure in E-learning. E-learning is still considered as a marginal way of training.
- Only a marginal part of the companies spent more than 30% of their training budget in e-learning. E-learning is never the main mean of learning what could be related with the low share of e-learning expenditure spends actually on contents.

➤ For 65% of the organisations, e-learning represents less than 10% of the training budget

[E-learning purchasers]

2.3.5) When did your company invested in e-learning ?

	#	%
This year	17	28,8
Last year	15	25,4
2 years ago	14	23,7
3 years ago	10	16,9
Before	3	5,1
Total	59	100



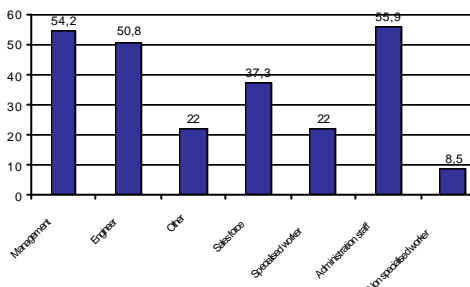
- 54% of the organisations invested in elearning in the past two years. The trend is recent and concerned a few organisations (39/171). Moreover the current expenditure on e-learning is very low for a large majority of companies which are purchaser.
- However 29% of the purchasers of e-learning invested this year. This is the most important percentage for the last 4 years and it may be the confirmation of a trend.

➤ For 54% of the purchasers, the investment on e-learning dates from 2 years.

[E-learning purchasers]

2.3.6) For which employees category did your company purchase e-learning products?

	#	%
Management	32	54,2
Engineer	30	50,8
Other	13	22
Sales force	22	37,3
Specialised worker	13	22
Administration staff	33	55,9
Non specialised worker	5	8,5
Total / answers	59	250,8



- For 51% of the organisations, elearning is purchased for Management, Engineer or Administration. This is high intellectual value functions. The indirect cost of e-learning could explain the choice to prefer this high skill functions.
- Only 37% of the organisations implicated their sales force in elearning. This kind of employees needs training on the products of their own companies, but the e-learning products may be too generic to answer these expectations.

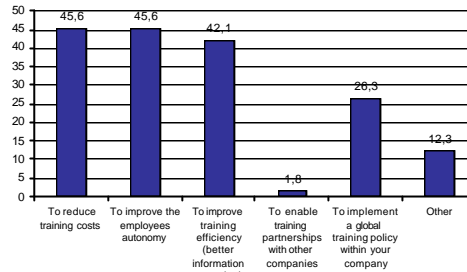
➤ For 51% of the organisations, e-learning is purchased for Management, Engineer or Administration.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

[E-learning purchasers]

2.3.7) Why has your organisation decided to invest in e-learning ?

	#	%
To reduce training costs	26	45,6
To improve the employees autonomy	26	45,6
To improve training efficiency (better information retention)	24	42,1
To enable training partnerships with other companies	1	1,8
To implement a global training policy within your company	15	26,3
Other	7	12,3
Total / answers	57	173,7



- About 46% of the companies decided to invest in e-learning to reduce training costs. This aim is easily understood because e-learning concerns jobs with high intellectual value and it is difficult to find teacher and courses for this kind of employees.
- For a large part of the companies the autonomy of the employees and the efficiency of the training are key advantages of e-learning. These advantages are the common features of e-learning and explain the results of the next question.
- Only 26% wish to implement a global training policy with e-learning. They consider e-learning as a common mean of training. It could be seen as weak but this a recent trend and represent a low part of the training budget.

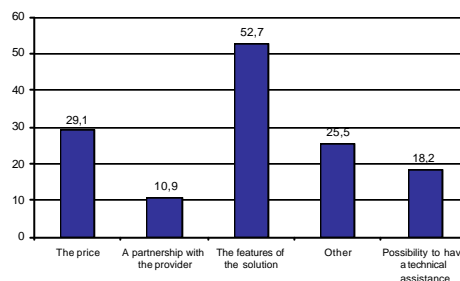
➤ **About 46% of the companies decided to invest in e-learning to reduce training costs, and focus on autonomy and retention of information by the employees.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

[E-learning purchasers]

2.3.8) What determined your organisation to buy your actual e-learning solution?

	#	%
The price	16	29,1
A partnership with the provider	6	10,9
The features of the solution	29	52,7
Other	14	25,5
Possibility to have a technical assistance	10	18,2
Total / answers	55	136,4



- 53% of the organisations chose to invest in e-learning because of the features of the solution, what is the proof that e-learning provides specific needs. This organisations could be considered as regular customers.
- Furthermore 29% underlines the importance of the price, despite the fact that the content represent a low part of the expenditure.

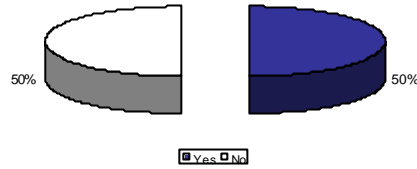
➤ **53% of the organisations chose to invest in e-learning because of the features of the solution**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

[E-learning purchasers]

2.3.9) Have your organisation purchased packaged e-learning products ? (i.e. e-learning courses + software)

	#	%
Yes	29	50
No	29	50
Total	58	100



- 50% of the purchasers did not bought packaged elearning products. Moreover in their majority, they spent less than 10% of their e-learning budget on courses, so software is the main part of e-learning products purchased by the organisations.
- However 50% of the organisations preferred to invest in packaged products, which may be easier for the companies, which are recent purchaser.

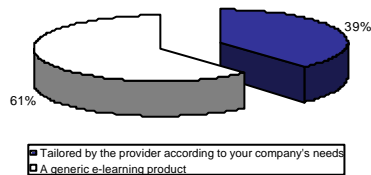
➤ **Companies are clearly divided between choosing packaged products or not.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

[E-learning purchasers]

2.3.10) The e-learning product of your company is :

	#	%
Tailored by the provider according to your company's	24	42,1
A generic e-learning product	33	66,7
Total / answers	57	108,8



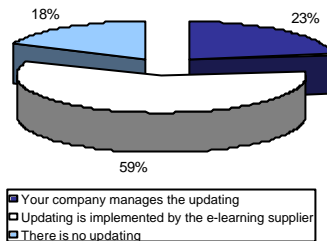
- 67% of the e-learning product bought by the purchasers are a generic product. The solution of a generic product is easier in providers' point of view, but could explain why the sales force are not so involved in e-learning training program.

➤ **67% of the e-learning product bought by the purchasers are a generic product.**

[E-learning purchasers]

2.3.11) When e-learning courses have to be updated :

	#	%
Your company manages the updating	15	26,3
Updating is implemented by the e-learning supplier	38	66,7
There is no updating	12	21,1
Total / answers	57	114



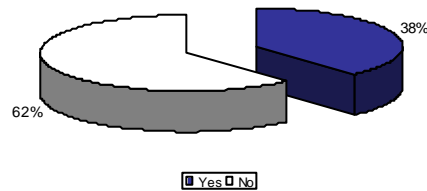
- 59% of the courses bought by the organisations are updated by the e-learning supplier. The relationship between the provider and the organisation are consequently important and underlines that the companies want product easy to use.
- 18% of the organisations did not developed any system of updating. It is amazing that the provider did not create such system which could help the organisations and encourage a regular consumption.

➤ **59% of the courses bought by the organisations are updated by the e-learning supplier, but 18% did not developed any system.**

[E-learning purchasers]

2.3.12) Are there e-learning specialised employees in your organisation (i.e. who would be responsible for the day to day e-learning management)?

	#	%
Yes	23	38,3
No	37	61,7
Total	60	100



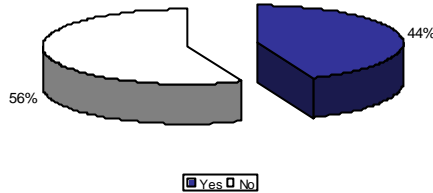
- 62% of the organisations have not designated an employee to be responsible for the day to day e-learning management. It is linked with a low share of the global training expenditure in e-learning, especially in courses and the fact that the investments are often new.
- 38% of organisations with a such system, it underlines the recognition of the e-learning as a way of training. However we notice that only 26% have developed an updating system too, which seems amazing. The companies, even if they understand some problems of the e-learning, but may need some help to create such system.

➤ **62% of the organisations have not designated an employee to be responsible for the day to day e-learning management**

[E-learning purchasers]

2.3.13) Is your e-learning system integrated with a global HR system ?

	#	%
Yes	25	43.9
No	32	56.1
Total	57	100



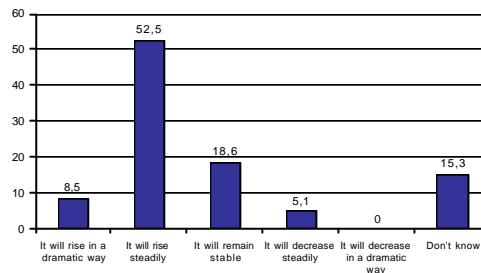
- 56% of the companies have not integrated their e-learning system with a global HR system. It confirms that the e-learning always is a new trend and is not yet deeply fixed in the organisation of the companies.
- 44% of the companies have already developed an integration of the e-learning system with their HR system. This share is quite low but if you take into consideration that only 40% of the companies have designated someone to manage the day to day e-learning system, the share is significant.

➤ 56% of the companies have not integrated their e-learning system with a global HR system but the integration is closely linked with the existence of e-learning specialised employees.

[E-learning purchasers]

2.3.14) In the future, how will the share of e-learning in training expenditure of your company involve?

	#	%
It will rise in a dramatic way	5	8.5
It will rise steadily	31	52.5
It will remain stable	11	18.6
It will decrease steadily	3	5.1
It will decrease in a dramatic way	0	0
Don't know	9	15.3
Total	59	100



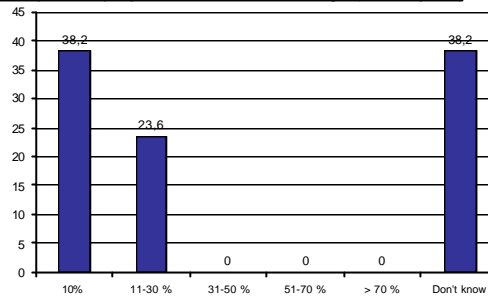
- 61% of the purchasers of e-learning want to increase the share of e-learning in the global training budget. However even if the investment will increase, the trend is not in a dramatic way. The development seems reasonable and according to the interviewers the perception of e-learning is linked with the expected evolution of computing.
- Only 5% expect a decrease of the e-learning in training expenditure. So the organisations agree about this trend.

➤ 61% of the purchasers of e-learning want to increase the share of e-learning in the global training budget.

[E-learning purchasers]

2.3.15) What is the forecasted share expenditure of your company to be related with e-learning ? (within 2 years)

	#	%
10%	21	38,2
11-30 %	13	23,6
31-50 %	0	0
51-70 %	0	0
> 70 %	0	0
Don't know	21	38,2
Total	55	100



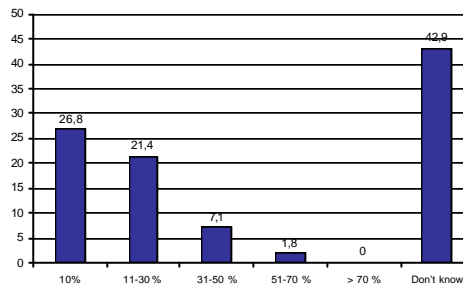
- All the organisations do not forecast to invest more than 30% of their expenditure in e-learning within 2 years. These figures are a little smaller than the current one. The number of people who can not give an answer have steadily increase. The recent evolution of share market and the uncertainty of the economy could decrease the interest for such investment.

➤ All the organisations do not forecast to invest more than 30% of their expenditure in e-learning within 2 years.

[E-learning purchasers]

2.3.15) What is the forecasted share expenditure of your company to be related with e-learning ? (within 5 years)

	#	%
10%	15	26,8
11-30 %	12	21,4
31-50 %	4	7,1
51-70 %	1	1,8
> 70 %	0	0
Don't know	24	42,9
Total	56	100



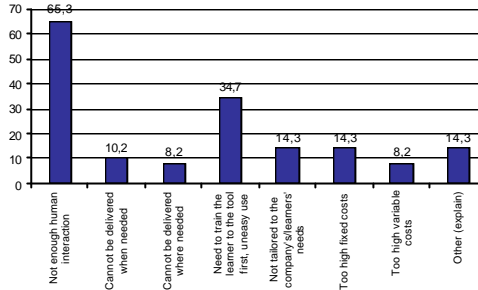
- About 27 % of the companies forecast to invest less than 10% of their expenditure in e-learning within 5 years.
- The trend between 2 and 5 years is an increase of the share of e-learning which underlines that the director of Human Resources plans to use it more and more and consider it as a real opportunity of learning.
- However 43% have no idea about the share of expenditure they will spend on e-learning within 5 years. So the evolution is always uncertain and there seems to be no deep change within 5 years in companies in the learning way

➤ 69% of the companies can not forecast or forecast to invest less than 10 % of their expenditure within 5 years.

[E-learning purchasers]

2.3.16) What is the main disadvantage of e-learning?

	#	%
Not enough human interaction	32	65,3
Cannot be delivered when needed	5	10,2
Cannot be delivered where needed	4	8,2
Need to train the learner to the tool first, uneasy use	17	34,7
Not tailored to the company's/learners' needs	7	14,3
Too high fixed costs	7	14,3
Too high variable costs	4	8,2
Other (explain)	7	14,3
Total / answers	49	169,4



- 65% of the companies stress that the main disadvantage of the e-learning is the lack of human interaction. The possibility of self teaching is one of the most important features of e-learning and it seems obvious that this significant change with the learning habits could generate some fears.
- Thus the second fear concerning e-learning is the uneasy use and the need to train the learner to the tool first for about 35% of the interviewed companies. This fear may be linked with the lack of human interaction. The learners are not sure to be able to understand alone the way to use e-learning and they wish to have a teacher or an other user able to help them.
- The other disadvantages can not be considered as significant.

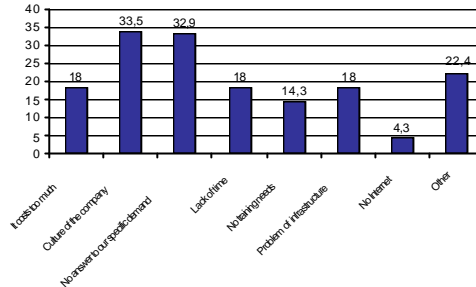
➤ **65% of the companies stress that the main disadvantage of the elearning is the lack of human interaction.**

Neither (never used e-learning)

[Neither]

3.1) What is the main reason why your organisation doesn't use e-learning?

	#	%
It costs too much	29	18
Culture of the company	54	33,5
No answer to our specific demand	53	32,9
Lack of time	29	18
No training needs	23	14,3
Problem of infrastructure	29	18
No Internet	7	4,3
Other	36	22,4
Total / answers	161	161,5



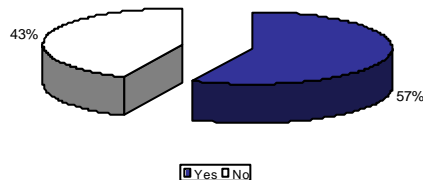
- About 33% of the companies think that e-learning can not afford them an offer which could answer to their specific needs. In fact, the e-learning products are for a main part generic (what is denounced by the purchasers too) and can not take companies' reality into account.
- 34% have a culture which could not allow the use of e-learning. In fact the training of the employees is a key question in the firms and lots of agreements between trade union and the management already exist. Moreover some sectors are not very used to deal with computing solutions.
- The other disadvantages are not very significant.

➤ **About 33% of the companies think that e-learning is not appropriated to their structure and their culture.**

[Neither]

3.2) Would your company decide to invest in e-learning in the future?

	#	%
Yes	85	57
No	64	43
Total	149	100



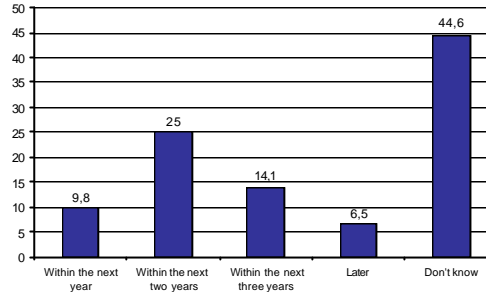
- 57% of the companies have planned to invest in e-learning in the future.
- About 43% of the companies do not envisage to invest in e-learning in the future. It may be linked with the fact that for about 33% of the companies e-learning can not answer to their specific demand.
- Except the companies with a specific demand, all the companies will invest in e-learning if they do not use it today.

• **Except the companies with a specific demand, all the companies will invest in e-learning if they do not use or purchase it today.**

[Neither]

3.3) If yes, when does your organisation plan to invest in e-learning?

	#	%
Within the next year	9	9,8
Within the next two years	23	25
Within the next three years	13	14,1
Later	6	6,5
Don't know	41	44,6
Total	92	100



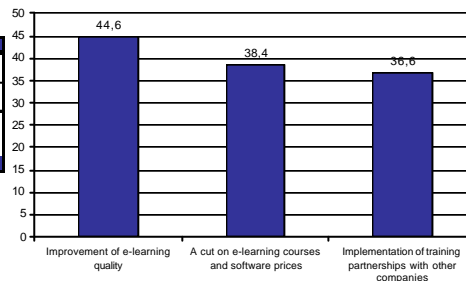
- About 45% of the organisations which decide to invest in e-learning in the future do not know today what their agenda will be. It is worrying because it sounds like the acceptance of a trend and not like the result of a strategy. That is the reason why we must be very cautious about the precedent question.
- 35% of the companies will invest in the next 2 years and have already planned it. We can expect an increase of the demand of e-learning product but we have to convince a lot of indecisive persons

➤ About 45% of the organisations which decide to invest in elearning in the future do not know today what their agenda will be.

[Neither]

3.4) What would determine your organisation to invest in e-learning in the future?

	#	%
Improvement of e-learning quality	50	44,6
A cut on e-learning courses and software prices	43	38,4
Implementation of training partnerships with other companies	41	36,6
Total / answers	112	119,6



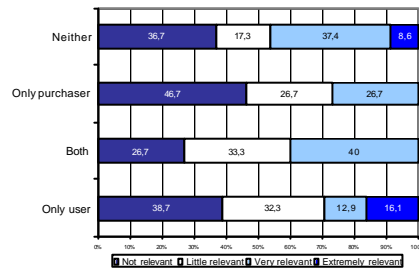
- There is no specific improvement which can create the decision of buying elearning. The companies seem to wish a whole improvement of the main disadvantages of e-learning even if the quality seems to be a key success factor.

➤ There is no specific improvement which can create the decision of buying e-learning.

The future of e-learning

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Tableau 4 : Colonne : Increased awareness and promotional information		Only user	Both	Only purchaser	Neither	Total
4.2.1) Are you purchasing information on e-learning ?	Not relevant	38,7	26,7	46,7	36,7	36,3
	Little relevant	32,3	33,3	26,7	17,3	22,3
	Very relevant	12,9	40	26,7	37,4	33,5
	Extremely relevant	16,1			8,6	7,9
	Total	100	100	100	100	100

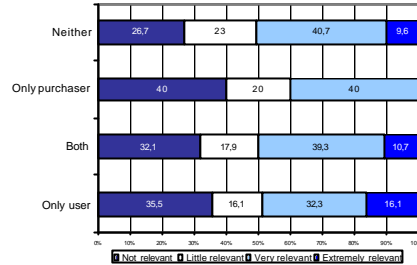


- We can notice the existence of different profiles. The organisations which are already involved in e-learning systems do not need more information about awareness or promotional information on e-learning offers.
- This trend is more important when the Human Resources Directors are only purchasers. In fact, they have to know all the possibilities of training and especially the new ways, so they have already developed their information system.
- However an information campaign could be a good way to get new customers. In fact about 48% of the companies that have never used elearning wish to obtain more information on elearning products. This underlines that the HR departments are very interested in this new possibility in training policy.

➤ **A communication plan may be a good mean to obtain new clients.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Column : E-learning industry forums freely available and recognized						
Tableau: % Colomnes	Only user	Both	Only purchaser	Neither	Total	
6.2.1) Are you a purchaser and/or a user of e-learning ?	Not relevant	35,5	32,1	40	26,7	29,7
	Little relevant	16,1	17,9	20	23	21,1
	Very relevant	32,3	39,3	40	40,7	39,2
	Extremely relevant	16,1	10,7		9,6	10
	Total	100	100	100	100	100

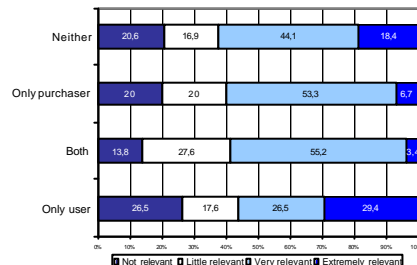


- About 55% of the organisations that already have information about e-learning are not interested in the existence of forums. However they are divided between this trend and the necessity to be informed of the new tendency and efficient product. Moreover for these companies getting the right information can take a lot of time.
- The need for information of the companies that have never used e-learning can explain their opening position concerning such forums.

➤ The companies are divided between the need for information and the waste of time with such forums.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Column : Recognising trends and problems in continuing training						
Tableau: % Colomnes	Only user	Both	Only purchaser	Neither	Total	
6.2.1) Are you a purchaser and/or a user of e-learning ?	Not relevant	26,5	13,8	20	20,6	20,6
	Little relevant	17,6	27,6	20	16,3	16,7
	Very relevant	26,5	55,2	53,3	44,1	43,5
	Extremely relevant	29,4	3,4	6,7	18,4	17,3
	Total	100	100	100	100	100

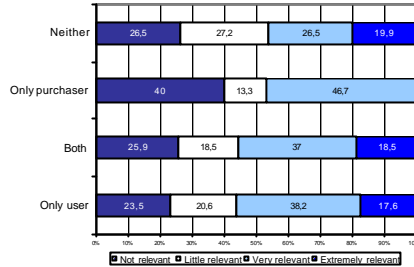


- 61% of the companies wish to be informed about the last evolutions and the short term perspectives in e-learning.
- 60% of the purchasers support the creation of a such system. Indeed the lack of human interaction could create a lack of reactivity concerning the efficiency and sufficiency of e-learning. This is one of the main fears of the HR departments in training.
- The situation of users is quite different because they are less involved in this problem.

➤ A precise information on e-learning all over the time is important for a majority of companies.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

		Column : Recognising qualification needs				
Tableau: % Colonnes		Only user	Both	Only purchaser	Neither	Total
6.2.1) Au sein de l'entreprise, qui est en charge de l'achat et/ou de la mise en œuvre de la formation ?	Not relevant	23,5	25,9	40	26,5	26,9
	Little relevant	20,6	18,5	13,3	27,2	24,1
	Very relevant	38,2	37	46,7	26,5	31,1
	Extremely relevant	17,6	18,5		19,9	17,9
	Total	100	100	100	100	100

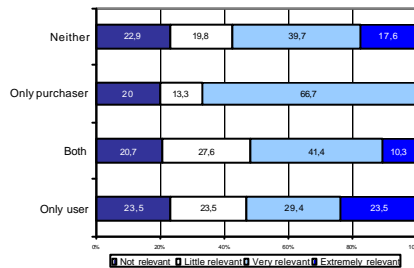


- A majority of the interviewed companies do not find relevant to develop a system which can define the needs of each employees. The training is always considered as something with a great part of feelings. First it is difficult for employees to accept not to be involved in training choices and secondly for the HR department that defines this function as one of the aims of their job.
- However about 49% of these organisations wish to have such a system especially when they are only user. It may be an instrument to organize an efficient training system and create a kind of indicator.

➤ **A system of recognition of qualification needs is not a priority for the companies.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

		Column : Off the shelf training				
Tableau: % Colonnes		Only user	Both	Only purchaser	Neither	Total
6.2.1) Au sein de l'entreprise, qui est en charge de l'achat et/ou de la mise en œuvre de la formation ?	Not relevant	23,5	20,7	20	22,9	22,5
	Little relevant	23,5	27,6	13,3	19,8	21,1
	Very relevant	29,4	41,4	66,7	39,7	40,2
	Extremely relevant	23,5	10,3		17,6	16,3
	Total	100	100	100	100	100

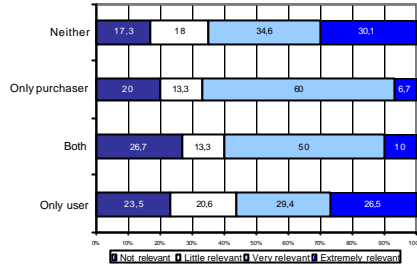


- About 57% of the companies are interested in such simplification of the access to e-learning.
- We notice that the purchasers that are mainly in charge of this part of e-learning are the most interested. It underlines an important problem of the e-learning products. This problem is all the more important since the companies complain about the lack of information concerning e-learning products.

➤ **The wish of simplicity in buying products and the lack of information may put a brake on the e-learning development**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

		Column : Transferability & recognition of qualification				
Tableau : % Colomnes		Only user	Both	Only purchaser	Neither	Total
6.2.1) Au vu de votre expérience, comment évaluez-vous la pertinence de l'achat de formation ?	Not relevant	23,5	26,7	20	17,3	19,8
	Little relevant	20,6	13,3	13,3	18	17,5
	Very relevant	29,4	50	60	34,6	37,7
	Extremely relevant	26,5	10	6,7	30,1	25
	Total	100	100	100	100	100

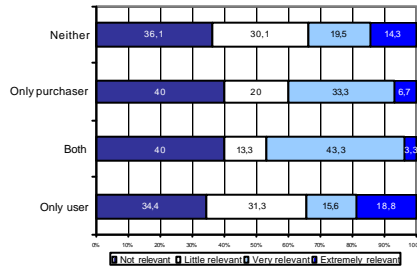


- The capacity for the companies to align the training value of various providers' content with the company's own scale is wished by 54% of the organisations. The companies show a deep interest in information on quality and a mean of differentiation of the providers' offer.
- Once again the purchasers are more interested in such means. A plethora offer may account for the creation of this instrument in order to simplify the choice of the HR department. It is all the more important that e-learning is a new product and a few people manage it perfectly today.

➤ **The capacity for the companies to align the the training value of various providers' content with the company's own scale is wished by 53% of the organisations.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

		Column : Extended enterprise				
Tableau : % Colomnes		Only user	Both	Only purchaser	Neither	Total
6.2.1) Au vu de votre expérience, comment évaluez-vous la pertinence de l'achat de formation ?	Not relevant	34,4	40	40	36,1	36,7
	Little relevant	31,3	13,3	20	30,1	27,1
	Very relevant	15,6	43,3	33,3	19,5	23,3
	Extremely relevant	18,8	3,3	6,7	14,3	12,9
	Total	100	100	100	100	100

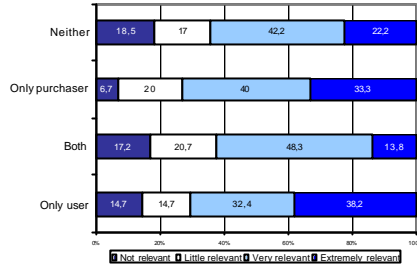


- A large majority of companies do not understand the interest of this system. In fact the training is something considered as quite confidential and if the companies got a specific offer that integrated internal information, it seems obvious that they prefer not to share it in a competitive environment.
- The training cooperation is developed in very specific activities and implicate a small amount of companies. In this case they could find their own solution with providers.

➤ **Extended enterprise do not arouse the interest of companies.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

		Column : Easier calculation of ROI				
Tableau % Colomnes		Only user	Both	Only purchaser	Neither	Total
6.23) Au point de vue du rôle du responsable de l'achat et/ou de la formation ?	Not relevant	14,7	17,2	6,7	18,5	16,9
	Little relevant	14,7	20,7	20	17	17,4
	Very relevant	32,4	48,3	40	42,2	41,3
	Extremely relevant	38,2	13,8	33,3	22,2	24,4
	Total	100	100	100	100	100

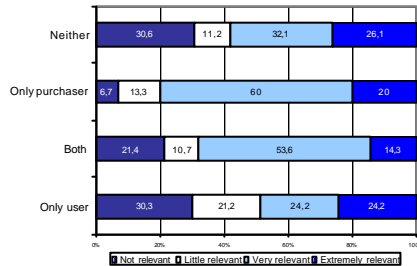


- We notice that the companies wish in the same proportion an easier calculation of the Return On Investment and transferability and recognition of qualification. The efficiency of learning in general and e-learning in particular is difficult to define. That is why an instrument which could give objective information on it prove a tremendous success with companies

➤ An objective instrument to define the efficiency of learning is waited by a majority of companies.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

		Column : Costs management systems				
Tableau % Colomnes		Only user	Both	Only purchaser	Neither	Total
6.23) Au point de vue du rôle du responsable de l'achat et/ou de la formation ?	Not relevant	30,3	21,4	6,7	30,6	27,6
	Little relevant	21,2	10,7	13,3	11,2	12,9
	Very relevant	24,2	53,6	60	32,1	35,7
	Extremely relevant	24,2	14,3	20	26,1	23,8
	Total	100	100	100	100	100

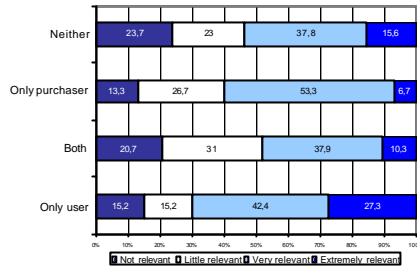


- 80% of purchasers needs a system which could help them to decide how to optimise the training budget allocation.
- Only 48% of companies that are users are interested in such system. In fact they are less involved in the decision process and may not be aware of the budget constraints.

➤ A large majority of purchasers needs a system that could help them to decide how to optimise the training budget allocation.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

		Column : Availability of generic e-learning brokers				
Tableau: % Colomnes		Only user	Both	Only purchaser	Neither	Total
6.23) Au. pour: "purchaser and/or only user of e-learning ?"	Not relevant	15,2	20,7	13,3	23,7	21,2
	Little relevant	15,2	31	26,7	23	23,1
	Very relevant	42,4	37,9	53,3	37,8	39,6
	Extremely relevant	27,3	10,3	6,7	15,6	16
	Total	100	100	100	100	100

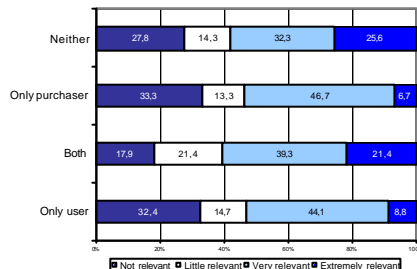


- This proposition seems to be approved by all kinds of people : users, purchasers, both or even the others.
- Indeed, this possibility would be a good mean to inform the ones who don't know e-learning at the moment. Seeing such a number of catalogues at the same time proves that the offer is developing and growing. It may help the non-users to decide to invest.
- Moreover, users and purchasers are really interested by this proposition that would allow them to choose better their tools and trainings and to define correctly their needs in function of the offer which exists.

➤ **E-learning brokers are a good mean to inform users, purchasers and non-users.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

		Column : Complete integration of HR and e-learning /knowledge management				
Tableau: % Colomnes		Only user	Both	Only purchaser	Neither	Total
6.24) Au. pour: "purchaser and/or only user of e-learning ?"	Not relevant	32,4	17,9	33,3	27,8	27,6
	Little relevant	14,7	21,4	13,3	14,3	15,2
	Very relevant	44,1	39,3	46,7	32,3	36,2
	Extremely relevant	8,8	21,4	6,7	25,6	21
	Total	100	100	100	100	100

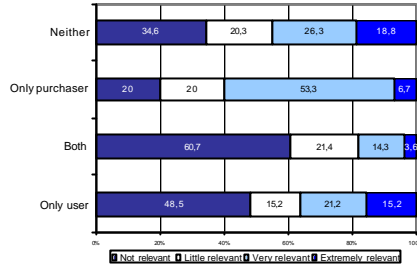


- 25% of the Neither find this integrated system very relevant. It is quite encouraging, but it also may be explained by the fact that for the moment they try to idealize e-learning.
- In fact, it may be quite difficult to imagine that system insofar as many people already have difficulties to understand what is e-learning.
- But, in the long run, this project can be one of the objectives of e-learning.

➤ **For the moment, the project may be too abstract to interest everyone.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

		Column : Certified training offer				
Tableau: % Colomnes		Only user	Both	Only purchaser	Neither	Total
6.21) Are you purchasing or planning to purchase e-learning ?	Not relevant	48,5	60,7	20	34,6	39,2
	Little relevant	15,2	21,4	20	20,3	19,6
	Very relevant	21,2	14,3	53,3	26,3	25,8
	Extremely relevant	15,2	3,6	6,7	18,8	15,3
	Total	100	100	100	100	100

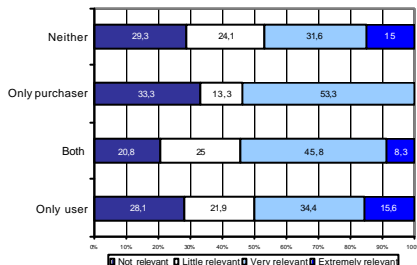


- A majority of companies and especially the ones that used and purchased e-learning are not interested in having one global certification scale. It is surprising because the opportunity to align the training value of various providers' content with the company's own scale is wished by 59% of the organisations.
- The organisation wishes a certification scale but it must be linked with the reality of their own company and their specific needs.

➤ **The organisations wish a certification scale but it must be linked with the reality of their own company and their specific needs.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

		Column : Proposing new training to individuals on a Permanent basis				
Tableau: % Colomnes		Only user	Both	Only purchaser	Neither	Total
6.21) Are you purchasing or planning to purchase e-learning ?	Not relevant	28,1	20,8	33,3	29,3	28,4
	Little relevant	21,9	25	13,3	24,1	23
	Very relevant	34,4	45,8	53,3	31,6	35,3
	Extremely relevant	15,6	8,3		15	13,2
	Total	100	100	100	100	100

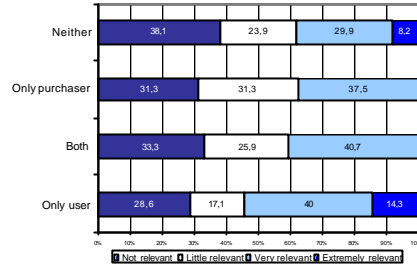


- The idea to have trainings available for employees on a permanent basis seems to be quite appreciated by purchasers and users.
- But, the answers are quite diverse ; that may be due to the different training systems which exist in the companies.
- Maybe for some purchasers, this proposal seem too expensive in comparison with the possibility to buy tailor-made training only when necessary.

➤ **People are quite divided about this proposal, maybe for reasons of flexibility and cost.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Column : Giving individuals an access to complete catalogue of learning resources						
Tableau: % Colomnes	Only user	Both	Only purchaser	Neither	Total	
6.3) Are you a purchaser and/or user of e-learning ?	Not relevant	28,6	33,3	31,3	38,1	35,4
	Littlerelevant	17,1	25,9	31,3	23,9	23,6
	Very relevant	40	40,7	37,5	29,9	33,5
	Extremely relevant	14,3			8,2	7,5
	Total	100	100	100	100	100

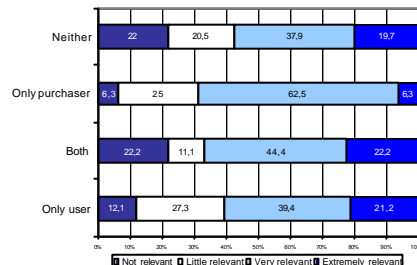


- On this figures, we can observe the gap that we mentioned earlier and which exist between users and purchasers of e-learning.
- Indeed, the purchasers seem to disapprove this proposal. Maybe, they prefer keeping some control on the decisions of purchase for their company. Actually, they are responsible for the training budget and the use of the investments.
- On the contrary, those who are both users and purchasers seem to be aware that the best way to do good investment is to let the employees choose or at least give their opinion on the product they will use.

➤ This possibility doesn't seem to be a priority neither for purchasers nor for users.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Column : Customisable professional development schemes						
Tableau: % Colomnes	Only user	Both	Only purchaser	Neither	Total	
6.3) Are you a purchaser and/or user of e-learning ?	Not relevant	12,1	22,2	6,3	22	19,2
	Littlerelevant	27,3	11,1	25	20,5	20,7
	Very relevant	39,4	44,4	62,5	37,9	40,9
	Extremely relevant	21,2	22,2	6,3	19,7	19,2
	Total	100	100	100	100	100

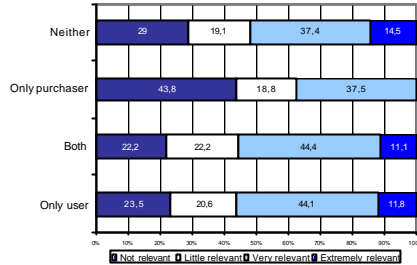


- This solution is unanimously approved, at the same time by the users and the purchasers.
- This customisable professional development schemes are a very good mean to choose the best training, which is interesting for both users, that will be satisfied of the training they chose themselves, and purchasers, who have the possibility to control the use of the tools.

➤ This offer seems to be a project interesting to implement.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

		Column : Interview at regular intervals				
Tableau : % Colomnes		Only user	Both	Only purchaser	Neither	Total
6.2.1) Au sein de l'achat et/ou de l'utilisateur ?	Not relevant	23,5	22,2	43,8	29	28,4
	Little relevant	20,6	22,2	18,8	19,1	19,7
	Very relevant	44,1	44,4	37,5	37,4	39,4
	Extremely relevant	11,8	11,1		14,5	12,5
	Total	100	100	100	100	100

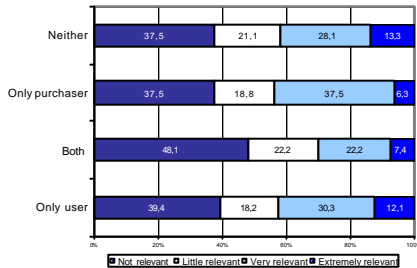


- The ones who disapproves the most this proposal are the purchasers.
- Maybe they fear a higher cost engendered by this additional system. Moreover, they may have the impression that the employees will not do it systematically or that they risk to waste their time.

➤ This solution doesn't seem very relevant, particularly for purchasers.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

		Column : On-line staff development consultancy for employees				
Tableau : % Colomnes		Only user	Both	Only purchaser	Neither	Total
6.2.1) Au sein de l'achat et/ou de l'utilisateur ?	Not relevant	39,4	48,1	37,5	37,5	39,2
	Little relevant	18,2	22,2	18,8	21,1	20,6
	Very relevant	30,3	22,2	37,5	28,1	28,4
	Extremely relevant	12,1	7,4	6,3	13,3	11,8
	Total	100	100	100	100	100

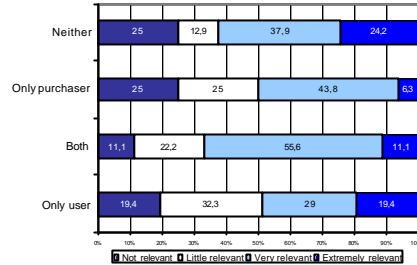


- Except the users who are 52% to find this idea relevant enough, all the other people interviewed did not find this idea interesting.
- Those who are both users and purchasers really disapprove of creating such a service. Maybe they are afraid of this system being useless and expensive to develop.

➤ The on-line staff development consultancy is not a project to launch.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Column : No restriction to train individual or teams (ie knowing that at will, either on						
Tableau: % Colonnes	Only user	Both	Only purchaser	Neither	Total	
6.20) Au vu de votre expérience, comment jugez-vous l'opportunité de l'apprentissage ?	Not relevant	19,4	11,1	25	25	22,2
	Little relevant	32,3	22,2	25	12,9	18,2
	Very relevant	29	55,6	43,8	37,9	39,4
	Extremely relevant	19,4	11,1	6,3	24,2	20,2
	Total	100	100	100	100	100

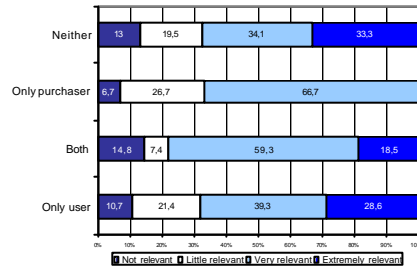


- The possibility to use e-training alone or with a whole team may be a good mean to convince some purchasers or users.
- Indeed, for the purchasers, it appears more interesting to invest for a tool which can be used by several people at the same time.
- For the users, there may be two advantages. First, it creates human interactivity during the collective training. Secondly, as many training can be done alone, without any form of control, it may be more motivating to do the training with other people.

➤ This idea is really approved, maybe because it favours human interactivity .

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Column : Deliver the training at any time/any place (ie not having to regroup the trainee						
Tableau: % Colonnes	Only user	Both	Only purchaser	Neither	Total	
6.20) Au vu de votre expérience, comment jugez-vous l'opportunité de l'apprentissage ?	Not relevant	10,7	14,8	6,7	13	12,4
	Little relevant	21,4	7,4	26,7	19,5	16,7
	Very relevant	39,3	59,3	66,7	34,1	40,9
	Extremely relevant	28,6	18,5		33,3	28
	Total	100	100	100	100	100

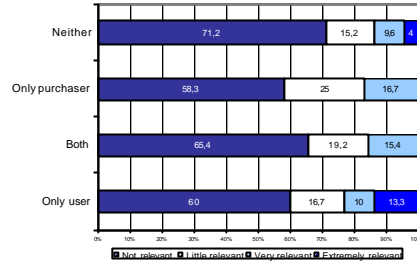


- The flexibility of training is one of the main features of e-learning and is considered as a very significant way to raise the interest in e-learning and respond to the e-learning needs in the future by all the kind of companies.

➤ The flexibility arouses the interest of all kinds of organisations.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

		Column : M-learning				
Tableau : % Colomnes		Only user	Both	Only purchaser	Neither	Total
6.2.1) Au sein des utilisateurs et acheteurs d'e-learning ?	Not relevant	60	65,4	58,3	71,2	67,9
	Little relevant	16,7	19,2	25	15,2	16,6
	Very relevant	10	15,4	16,7	9,6	10,9
	Extremely relevant	13,3			4	4,7
	Total	100	100	100	100	100

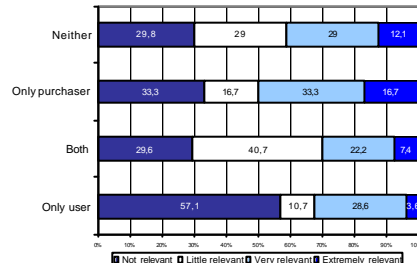


- Except 13% of the users who find Mlearning very relevant, 84% of the people interviewed completely disapprove this solution.

➤ **Mlearning is not relevant at all for the people interviewed.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

		Column : Use of virtual reality rooms/helmets				
Tableau : % Colomnes		Only user	Both	Only purchaser	Neither	Total
6.2.1) Au sein des utilisateurs et acheteurs d'e-learning ?	Not relevant	57,1	29,6	33,3	29,8	34
	Little relevant	10,7	40,7	16,7	29	27,2
	Very relevant	28,6	22,2	33,3	29	28,3
	Extremely relevant	3,6	7,4	16,7	12,1	10,5
	Total	100	100	100	100	100

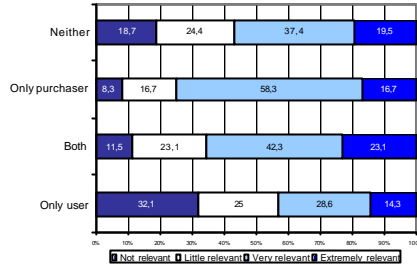


- The use of virtual reality rooms/helmets doesn't seem very relevant.
- Indeed, e-learning already frightens some people who are not used to work only with computers. Lots of users reproaches e-learning with the lack of human interactivity. They are not ready for virtual reality. It may be far too sophisticated. Moreover, scientists do not necessarily master this technique for the moment.
- Last, for those who are both users and purchasers, it seems that investing in such a modern equipment is not profitable enough.

➤ **The use of virtual reality does not seem more relevant than standard e-learning tools.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Column : High bandwidth for everybody allowing videoconference, video on demand						
Tableau: % Colomes	Only user	Both	Only purchaser	Neither	Total	
6.23) Are you a purchaser and/or a user of e-learning ?	Not relevant	32,1	11,5	8,3	18,7	19
	Little relevant	25	23,1	16,7	24,4	23,8
	Very relevant	28,6	42,3	58,3	37,4	38,1
	Extremely relevant	14,3	23,1	16,7	19,5	19
	Total	100	100	100	100	100

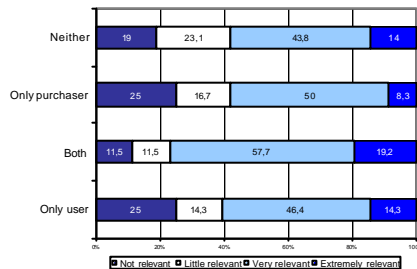


- All the people who know e-learning, and the difficulties to use it when the connexion to the Internet is too low, really agree with the idea of generalising high bandwidth.
- Moreover, it seems obvious that the Internet is a promising mean. Indeed, for example, in terms of human interactivity, it is a very useful tool, and very cheap in comparison with the telephone or the fax.

➤ **High bandwidth for everybody seems essential to develop the use of e-learning.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Column : Easy deployment						
Tableau: % Colomes	Only user	Both	Only purchaser	Neither	Total	
6.23) Are you a purchaser and/or a user of e-learning ?	Not relevant	25	11,5	25	19	19,3
	Little relevant	14,3	11,5	16,7	23,1	19,8
	Very relevant	46,4	57,7	50	43,8	46,5
	Extremely relevant	14,3	19,2	8,3	14	14,4
	Total	100	100	100	100	100

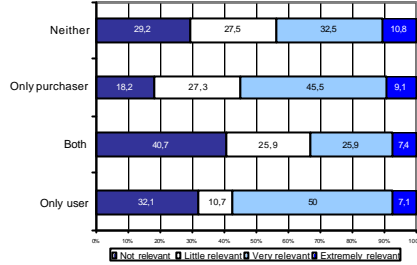


- This solution, without any surprise, is approved by 61% of the people. Indeed, it is a very good mean to simplify the use of e-learning. And for the moment, that seems to be one of the main disadvantage of this tool.

➤ **Everybody is interested in a way to simplify the use of e-learning.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

		Column : System integration services				
Tableau : % Colonnes		Only user	Both	Only purchaser	Neither	Total
6.2.1) Au point de vue des acheteurs et/ou des formateurs ?	Not relevant	32,1	40,7	18,2	29,2	30,6
	Little relevant	10,7	25,9	27,3	27,5	24,7
	Very relevant	50	25,9	45,5	32,5	34,9
	Extremely relevant	7,1	7,4	9,1	10,8	9,7
	Total	100	100	100	100	100

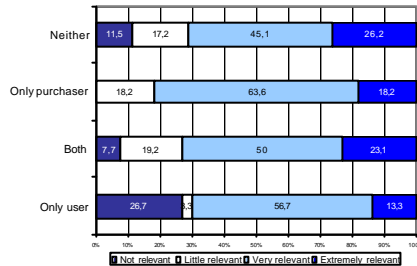


- Two points of view are clearly opposed.
- The purchasers are really interested in this idea which could make possible to reduce the investment in terms of equipment.
- But, those who are both users and purchasers are opposed to this project.

➤ **Purchasers are really interested in system integration services.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

		Column : No specific investment needed to deliver the training				
Tableau : % Colonnes		Only user	Both	Only purchaser	Neither	Total
6.2.1) Au point de vue des acheteurs et/ou des formateurs ?	Not relevant	26,7	7,7	11,5	12,7	12,7
	Little relevant	3,3	19,2	18,2	17,2	15,3
	Very relevant	56,7	50	63,6	45,1	48,7
	Extremely relevant	13,3	23,1	18,2	26,2	23,3
	Total	100	100	100	100	100

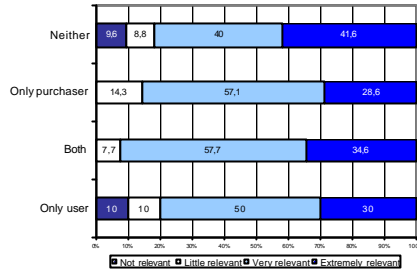


- With no surprise, everybody finds very interesting to have access to e-training without using specific material.
- It will be easier to use for the employees.
- It will generate less investment for the purchasers.

➤ **This solution would be perfect for everyone.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Column : Ability to adapt immediately the training to the level of the trainee					
Tableau: % Colomnes	Only user	Both	Only purchaser	Neither	Total
6.20) Au. poss. de purchaser and/or de e-learning ?	Not relevant	10		9,6	7,7
	Little relevant	10	7,7	14,3	8,8
	Very relevant	50	57,7	57,1	40
	Extremely relevant	30	34,6	28,6	41,6
	Total	100	100	100	100

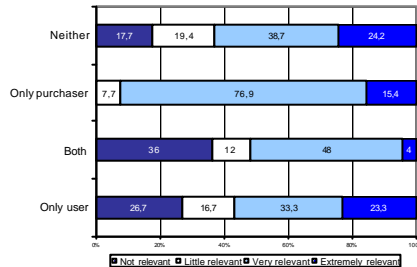


- This possibility really interests everyone.
- One more time, flexibility is one of the main advantage of e-learning. The ability to adapt immediately the training to the level of the trainee would be the best proof of flexibility of that tool.

➤ This solution seems ideal for both users and purchasers.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Column : Systematic certification					
Tableau: % Colomnes	Only user	Both	Only purchaser	Neither	Total
6.20) Au. poss. de purchaser and/or de e-learning ?	Not relevant	26,7	36	17,7	20,3
	Little relevant	16,7	12	7,7	19,4
	Very relevant	33,3	48	76,9	38,7
	Extremely relevant	23,3	4	15,4	24,2
	Total	100	100	100	100

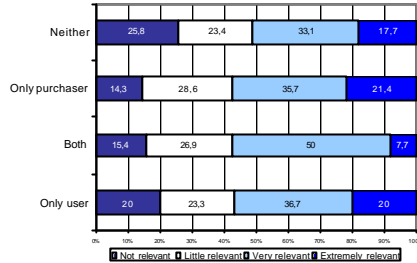


- For the purchasers, this systematic certification may be a good mean to calculate the return on investment.
- Moreover, it is a good way for users to assess the interest of their training.

➤ The purchasers completely approve the concept of systematic certification.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

		Column : Customer customisable course				
Tableau: % Colomnes		Only user	Both	Only purchaser	Neither	Total
6.2.1) Are you a purchaser and/or a user of e-learning ?	Not relevant	20	15,4	14,3	25,8	22,7
	Little relevant	23,3	26,9	28,6	23,4	24,2
	Very relevant	36,7	50	35,7	33,1	36,1
	Extremely relevant	20	7,7	21,4	17,7	17
	Total	100	100	100	100	100

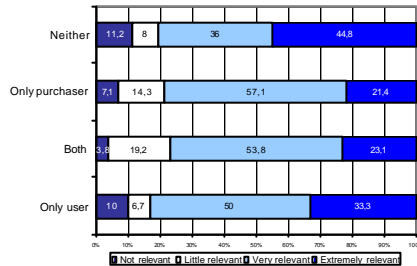


- 53% of the people think it would be a good idea to customise the courses.
- But on the other hand, it is more difficult to know exactly which training was done. For the purchasers, they do not really know what they buy.

➤ People are quite divided concerning this possibility to customise the courses.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

		Column : Inclusion of corporate knowledge				
Tableau: % Colomnes		Only user	Both	Only purchaser	Neither	Total
6.2.1) Are you a purchaser and/or a user of e-learning ?	Not relevant	10	3,8	7,1	11,2	9,7
	Little relevant	6,7	19,2	14,3	8	9,7
	Very relevant	50	53,8	57,1	36	42,1
	Extremely relevant	33,3	23,1	21,4	44,8	38,5
	Total	100	100	100	100	100

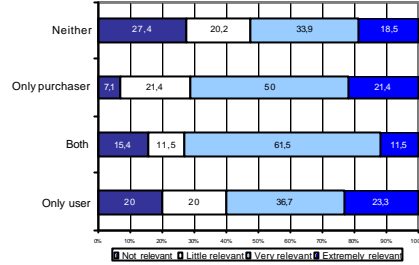


- Everybody agrees with that possibility.
- Of course, the main advantage of e-learning is its capacity to be flexible - anywhere, any when- but also to be tailor-made or even better, adapted to the needs of the company inserting specific knowledge from the corporation.

➤ Adaptability to the work of the company is one of the strongest wills.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Tableau 4 : Colonnes					
6.2.1) Ap. des utilisateurs pour l'achat et/ou la formation ?	Column : Interlocking of learning and working				
	Only user	Both	Only purchaser	Neither	Total
Not relevant	20	15,4	7,1	27,4	23,2
Little relevant	20	11,5	21,4	20,2	19,1
Very relevant	36,7	61,5	50	33,9	39,2
Extremely relevant	23,3	11,5	21,4	18,5	18,6
Total	100	100	100	100	100



- Interlocking of learning and working is a very good idea, because this solution guarantees the use of the tools.
- And, from the point of view of the users, it is an interesting solution which would make possible for them to learn at the precise moment they need the training. And it is a way to oblige them to do the training and to benefit from it. Indeed, if they must wait to be free to do their training, they will not be necessarily motivated.

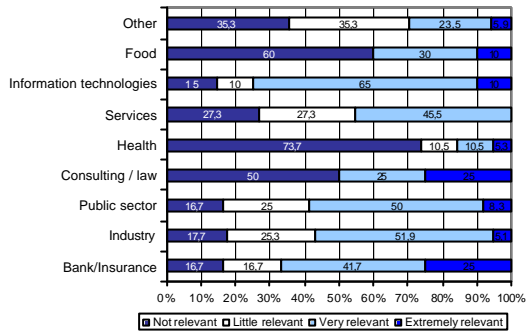
➤ It is a good solution to cope with the possible lack of time or motivation.

Profile

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Tableau : %		Column : E-learning industry forums freely available and recognized									
Colonne : Base		Bank/Insurance	Industr	Public sector	Consulting / law	Health	Services	Information technologies	Food	Other	
Repondants											
1.3) Which of the following subjects are of you	Not relevant	16,7	17,7	16,7	50	73,7	27,3	15	60	35,3	
	Little relevant	16,7	25,3	25	25	10,5	27,3	10		35,3	
	Very relevant	41,7	51,9	50	25	10,5	45,5	65	30	23,5	
	Extremely relevant	2,5	5,1	8,3	25	5,3		10	10	5,9	
	Total	100	100	100	100	100	100	100	100	100	100

Khi2=40,6 ddl=24 p=0,019



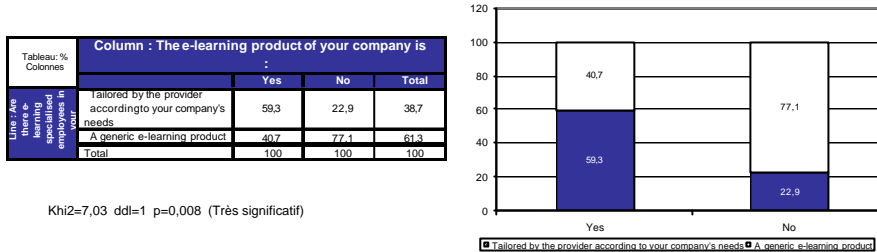
- The companies are divided over this proposition.
- The companies from Industry, Bank/Insurance, Information Technologies and Public sector are very interested in the creation of such forums.
- For the opponents, it may be linked with the culture of the companies. In fact Health sector has deep habits concerning learning and has already their own mean of information.
- They may not be very used of this new kind of teaching and can fear to lose a lots of time in such forums
- Furthermore these companies have often a few people involved in this kind of learning and they loose an important advantage of e-learning : the price.

➤ The creation of freely available and recognized forum divided the companies according to their activity

User - Profile

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Are there e-learning specialised employees in your organisation?

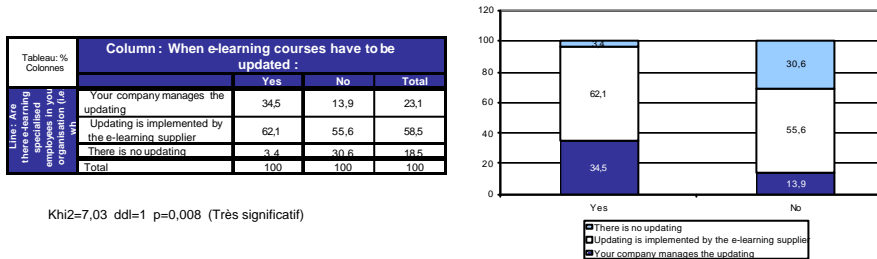


- The existence of an employee responsible for e-learning profoundly change the position of the companies concerning their e-learning product.
- In fact the development of tailored-made solution is closely linked with the presence of an e-learning employee. This solution suppose that the company already invest an important part of its learning expenditures on e-learning.
- Moreover the tailored-made solution is not an offer from the suppliers but the result of an internal work.

➤ **The existence of an employee responsible for e-learning profoundly change the position of the companies concerning their e-learning product.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Are there e-learning specialised employees in your organisation?



- The first element to note is the important part of the updating implemented by the suppliers.
- The significant change with the existence of an e-learning specialized employee is the part of no updating of e-learning system.
- According to the precedent results, the aims of a e-learning specialised are the promotion of a tailored-made solution and the existence of an updating which can be implemented by himself or the suppliers

➤ **The existence of an employee responsible for e-learning allow a efficient updating of the elearning system.**

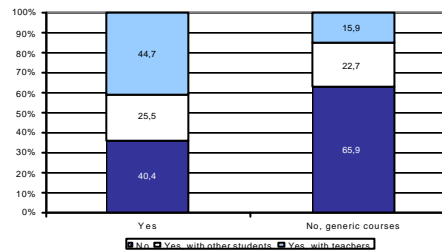
Purchaser Profile

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Are e-trainings tailor-made to your needs ?

Tableau: % Colonnes - Bas Répondants		Column : Is there any interactivity with people in your e-learning courses ?	
En colonnes : 25, 22,14) sur tailor-made		Yes	No, generic courses
No		40,4	65,9
Yes, with other students		25,5	22,7
Yes, with teachers		44,7	15,9
Total		110,6	104,5

Khi2=8,93 ddl=2 p=0,011 (Très significatif)



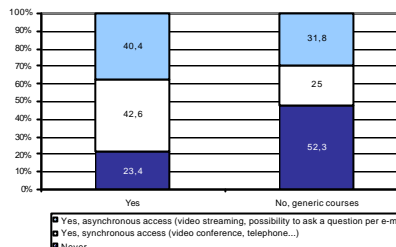
- In about 60 % of the companies which have implemented a tailor-made solution, there is an interactivity system with people of the courses.
- The difference is mainly based on the interactivity with teachers. It may be linked to the fact that when you choose a tailor-made solution, you really decide to develop e-learning and you know the most common disadvantage of e-learning : the lack of human interaction.
- However 40% of the students in the companies have no communication with the other people of their courses. It underlines the efficiency problem of such courses and the retention of information which is a key success factor of learning.

➤ **The interactivity with people in your e-learning courses and especially teachers is linked to the choice of a tailor-made solution.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Are e-trainings tailor-made to your needs ?

Tableau: % Colomnes - Base Respondants		Column : Does the e-learning happen with a teacher ?	
Columns : 23, 22, 14		Yes	No, generic courses
En ligne : Are e-trainings tailor-made to your needs ?	Never	23,4	52,3
	Yes, synchronous access (video conference, telephone...)	42,6	25
	Yes, asynchronous access (video streaming, possibility to ask a question per e-m)	40,4	31,8
	Total	106,4	109,1



Khi2=7,57 ddl=2 p=0,022 (Significatif)

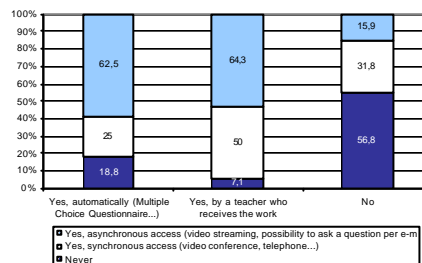
- The presence of a teacher is widespread in the companies with tailor-made solution. The access can be synchronous or asynchronous.
- Only 25% of the companies which implemented generic courses offer a direct access to the teacher for their employees. The generic products are promoted by suppliers but with this solution you encourage the main disadvantage of e-learning : lack of human interaction, retention of information.
- The majority of generic products do not come with the presence of a teacher and may be linked with the contents of the courses (language, computing) and the people involved in e-learning. In fact they have a lack of time, they need regular updating of their knowledge on these subjects.

➤ **The presence of a teacher and an synchronous access is clearly linked with the choice of a tailor-made solution.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Is e-learning assessed ?

Tableau: % Colomnes - Base Respondants		Column : Does the e-learning happen with a teacher ?		
Columns : 18, 22, 14		Yes, automaticall (Multiple Choice Questionnaire...)	Yes, by a teacher who receives the work	No
En ligne : Is e-learning assessed ?	Never	18,9	7,1	56,8
	Yes, synchronous access (video conference, telephone...)	25	50	31,8
	Yes, asynchronous access (video streaming possibility to ask a question per e-m)	62,5	64,3	15,9
	Total	106,3	121,4	104,5



Khi2=25,2 ddl=4 p=0,001 (Très significatif)

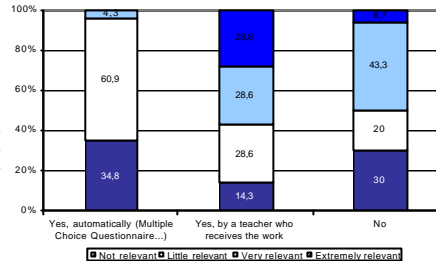
- The interactivity is a main factor of the assessment of elearning. In fact a large majority of the courses with interactivity are assessed. In the opposite when the students have never met a teacher, their formation are seldom assessed.
- This last result is less significant than it seems. In fact once again the content, the people involved increased this part. Indeed they learn with generic product on a permanent basis, it is linked to a specific need and that is why this kind of formation are seldom assessed.

➤ **The assessment of the courses is deeply linked with the contact with a teacher during the e-learning courses.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Is e-learning assessed ?

Tableau: % Colonnes - Base Répondants	Column : Increased awareness and promotional information			
	Yes, automatically (Multiple Choice Questionnaire...)	Yes, by a teacher who receives the work	No	
En ligne: Is e-learning assessed ?	Not relevant	34,8	14,3	30
	Little relevant	60,9	28,6	20
	Very relevant	4,3	28,6	43,3
	Extremely relevant		28,6	6,7
	Total	100	100	100



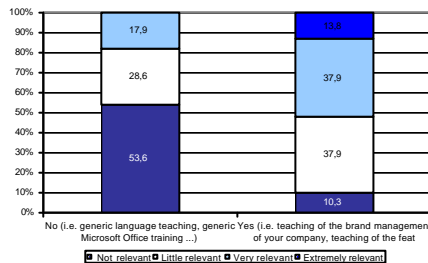
- 95% of the companies which automatically assessed e-learning do not wish more awareness and promotional information.
- For the majority of these companies, e-learning occurs with a teacher and their solution are often tailored-made which may suppose that they have already good mean of information.
- In the other cases, the companies are quite divided. It may be the result of a recent implementation of e-learning and this solution may be not already widespread in the company.

➤ **95% of the companies which automatically assessed elearning do not wish more awareness and promotional information.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Is e-learning related to the production work of your company ?

Tableau: % Colonnes - Base Répondants	Column : Increased awareness and promotional information		
	No (i.e. generic language teaching, generic Microsoft Office training ...)	Yes (i.e. teaching of the brand management of your company, teaching of the feat)	
En ligne: Is e-learning related to the production work of your company ?	Not relevant	53,6	10,3
	Little relevant	28,6	37,9
	Very relevant	17,9	37,9
	Extremely relevant		13,8
	Total	100	100

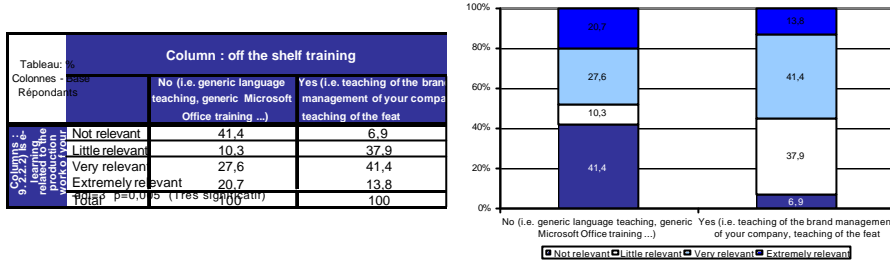


Khi2=11,7 ddl=3 p=0,009

- About 82% of the companies which use generic product do not wish more information about e-learning. They seem to be less involved in e-learning and the supplier realize a great communication about generic product which are today widespread in the general public and recognize.
- In the opposite 51% of the companies which use product linked with their production wish information. These companies already choose e-learning but the information on tailored-made solution is limited. We could imagine that they are not very pleased with their actual solution and want to improve it.
- This result underlines the co-existence of two kinds of clients.

➤ **This result underlines the co-existence of two kinds of clients.**

Line: Is e-learning related to the production work of your company ?

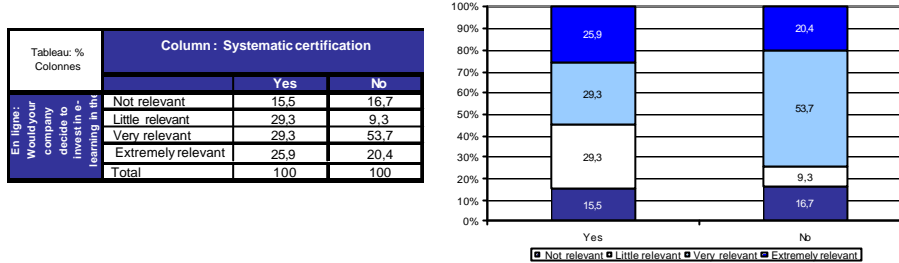


- The companies are divided concerning off the shelf training.
- We can notice that the perception of this proposition is quite better when the companies have production linked product. It may be the consequence of the kind of employees involved in e-learning because they have specific needs at specific time and this solution allows more flexibility and efficiency which are the main advantages of e-learning.
- According to the precedent results, we may notice that the companies want to have more information in order to allow them to organize off the shell training.

➤ The companies that favour specialised training are more interested in off the shelf training.

Neither – Profile

Line: Would your company decide to invest in e-learning in the future?



- We can notice two kinds of different behaviours about systematic certification.
- Indeed, the companies which have already decided to invest in e-learning in the future does not seem to to give much importance to systematic certification. For those people, it was not the decisive element for their investment since they are quite divided about the importance of systematic certification.
- On the other hand, the companies that have not planned to invest in e-learning in the future seem quite interested in systematic certification. That means that even though they do not know e-learning well, they may find it interesting in a long run.

➤ **Systematic certification can be a way to convince some companies to invest in e-learning in the future.**

Neither – Profile

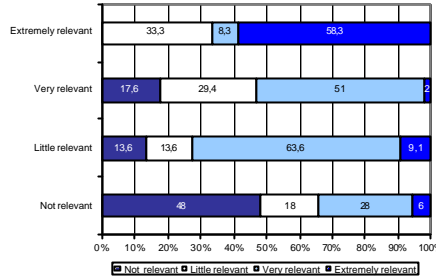
Final questions

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Increased awareness and promotional information

Tableau		Column : E-learning industry forums freely available and recognized			
En ligne : Increased awareness and promotional information		Not relevant	Little relevant	Very relevant	Extremely relevant
	Not relevant	48	13,6	17,6	
	Little relevant	18	13,6	29,4	33,3
	Very relevant	28	63,6	5,1	8,3
	Extremely relevant	6	9,1	2	58,3
	Total	100	100	100	100

Khi2=43 ddl=9 p=0,001



- This question shows the links that exists between two proposals : "increased awareness and promotional information" and "e-learning industry forums freely available and recognized".
- The results make it possible to understand that the people that are really interested in using forums are also interested in having more information about e-learning.
- On the contrary, those who did not find relevant to create forums are not interested in getting more information about e-learning neither.

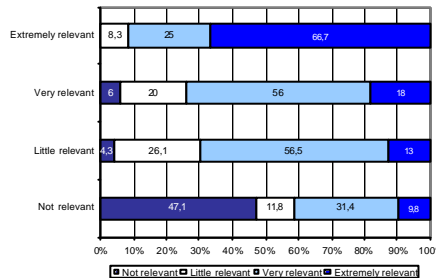
➤ Using forums can be a good way to inform people who want more awareness about e-learning.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Increased awareness and promotional information

Tableau		Column : Recognising trends and problems in continuing training			
En ligne : Increased awareness and promotional information		Not relevant	Little relevant	Very relevant	Extremely relevant
	Not relevant	47,1	4,3	6	
	Little relevant	11,8	26,1	20	8,3
	Very relevant	31,4	56,5	5,6	2,5
	Extremely relevant	9,8	13	1,8	66,7
	Total	100	100	100	100

Khi2=44,7 ddl=9 p=0,001



- This question deals with recognising trends and problems in continuing training.
- We note the same kind of behaviour than for the former question. Indeed, those who are not interested in getting information do not find any similar proposal relevant.
- But on the contrary, much people seem convinced by the idea of getting information about the evolution of the tools.

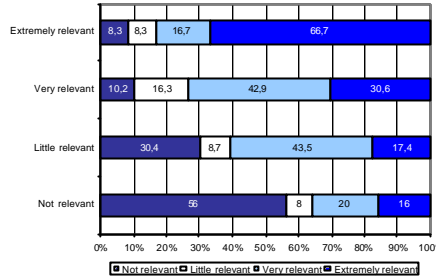
➤ Much people would be interested in getting information about the evolution of e-learning tools before investing.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Increased awareness and promotional information

		Column : Costs management systems			
Tableau :		Not relevant	Little relevant	Very relevant	Extremely relev
En ligne - Increased promotional information	Not relevant	56	30,4	10,2	8,3
	Little relevant	8	8,7	16,3	8,3
	Very relevant	20	43,5	42,9	16,7
	Extremely relevant	16	17,4	30,6	66,7
	Total	100	100	100	100

Khi2=44,7 ddl=9 p=0,001



- Generally speaking, people that are not interested in getting an increased awareness about e-learning offer, find the other proposals not relevant or little.
- However, the possibility to set costs management systems has really been appreciated by a large majority.
- That shows that even if some companies are a bit reluctant to invest in e-learning for the moment, and when they do not want to get more information about the different offers of e-learning, they recognize all the same that costs management systems could be very efficient tools to optimise the training budget allocation.

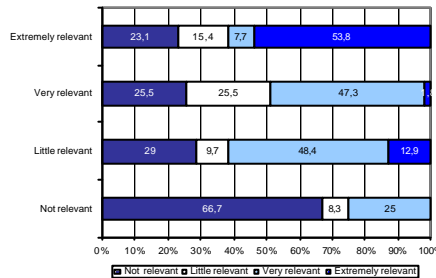
➤ **Costs management systems is a relevant tool to develop.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: E-learning industry forums freely available and recognized

		Column : Increased awareness and promotional information			
Tableau :		Not relevant	Little relevant	Very relevant	Extremely relevant
En ligne - E-learning available and recognized	Not relevant	66,7	29	25,5	23,1
	Little relevant	8,3	9,7	25,5	15,4
	Very relevant	25	48,4	47,3	7,7
	Extremely relevant		12,9	1,8	53,8
	Total	100	100	100	100

Khi2=9 p=0,001



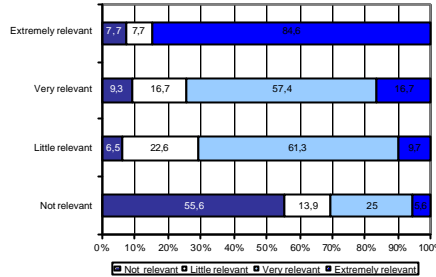
- The analysis of these results confirm our hypothesis on precedent pages.
- Indeed, people who are ready to resort to e-learning forums are less interested in getting information through traditional means. Apparently, it is more reassuring to discuss with users of e-learning who will tell them what they really think of the tool they use, about its qualities or defects.

➤ **Potential users prefer be informed through the discussion with e-learning users. Maybe they trust more their telling about their experience than different kinds of adverts.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: E-learning industry forums freely available and recognized

		Column : Recognising trends and problems in continuing training			
		Not relevant	Little relevant	Very relevant	Extremely relevant
En ligne - E-learning Colonnes Cibles et reconnues	Not relevant	55,6	6,5	9,3	7,7
	Little relevant	13,9	22,6	16,7	7,7
	Very relevant	25	61,3	57,4	
	Extremely relevant	5,6	9,7	16,7	84,6
	Total	100	100	100	100



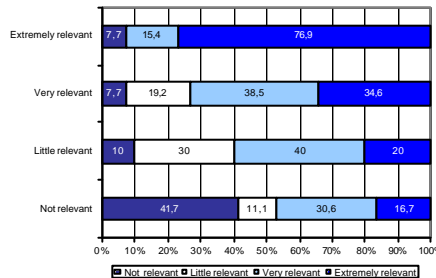
- We can observe that the way people answered to the questions is quite significant. Indeed, we note two different positions.
- For example, 85 % of those who find extremely relevant to use forums are really interested in a system to recognise trends and problems. Indeed, it would be a way to complete what users have told them on forums.
- On the other hand, when people do not find relevant to discuss on forums, they are not interested in knowing trends and problems in continuing training.

➤ **Generally speaking, there is a kind of people who are not interested in e-learning, and do not want more information about it.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: E-learning industry forums freely available and recognized

		Column : transferability & recognition of qualification			
		Not relevant	Little relevant	Very relevant	Extremely relevant
En ligne - E-learning Colonnes Cibles et reconnues	Not relevant	41,7	10	7,7	7,7
	Little relevant	11,1	30	19,2	
	Very relevant	30,6	40	38,5	15,4
	Extremely relevant	16,7	20	34,6	76,9
	Total	100	100	100	100

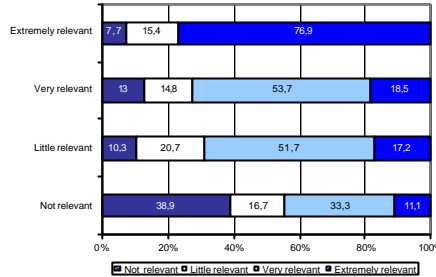


- It seems that the people who are interested in using forums are very open to the different proposals concerning information about e-learning.
- For example, here, more than 90% of them find very relevant or even extremely relevant to have the possibility to compare all the providers' offers and to create a real standard of assessment adapted to their company.
- In the same way, we have already noted that the people who are not interested in e-learning tend to find all the proposals not relevant.

➤ **The forums may be a good tool to compare providers and benchmark their offers.**

Line: E-learning industry forums freely available and recognized

		Column : Easier calculation of ROI			
Tableau: % Colonnes		Not relevant	Little relevant	Very relevant	Extremely relevant
En ligne - E-learning /available and recognized	Not relevant	38,9	10,3	13	7,7
	Little relevant	16,7	20,7	14,8	15,4
	Very relevant	33,3	51,7	53,7	
	Extremely relevant	11,1	17,2	18,5	76,9
	Total	100	100	100	100

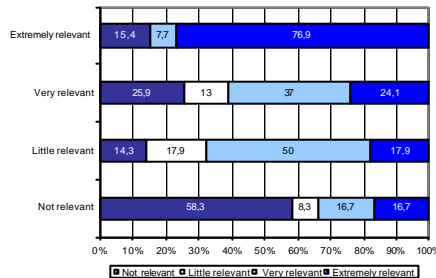


- This proposal seems to be very appreciated by the potential users or buyers of e-learning.
- Indeed, if forums are a very good way to exchange different points of view concerning tools and contents, a system that would easily calculate the ROI for each trainee is a very good solution.
- Quite surprisingly, we note here that those who do not find the forums interesting, are quite interested in an easier calculation of ROI. Maybe, they were afraid of the chats on forums being not constructive and objective enough.

➤ Easier calculation of ROI is a good element to convince some perplexed prospects.

Line: E-learning industry forums freely available and recognized

		Column : Costs management systems			
Tableau: % Colonnes		Not relevant	Little relevant	Very relevant	Extremely relevant
En ligne - E-learning /available and recognized	Not relevant	58,3	14,3	25,9	15,4
	Little relevant	8,3	17,9	13	
	Very relevant	16,7	50	37	7,7
	Extremely relevant	16,7	17,9	24,1	76,9
	Total	100	100	100	100



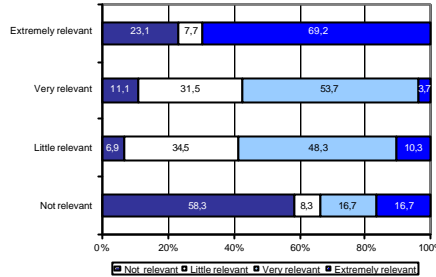
- The potential buyers of e-learning solutions really need to be reassured and to get as much information as possible before deciding to invest.
- It seems very clear that if those people want to share their point of view with other users thanks to forums, they also want to have access to rational and efficient tool.
- The combination of both means would make it possible for them to define the real needs of their company according to the products which exist, and to adapt the budget in consequence.

➤ Potential buyers would like to combine forums and cost management systems.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: E-learning industry forums freely available and recognized

		Column : Availability of generic e-learning brokers			
		Not relevant	Little relevant	Very relevant	Extremely relevant
En ligne - E-learning - utilisabilité et reconnaissance	Not relevant	58,3	6,9	11,1	23,1
	Little relevant	8,3	34,5	31,5	7,7
	Very relevant	16,7	48,3	53,7	
	Extremely relevant	16,7	10,3	3,7	69,2
	Total	100	100	100	100



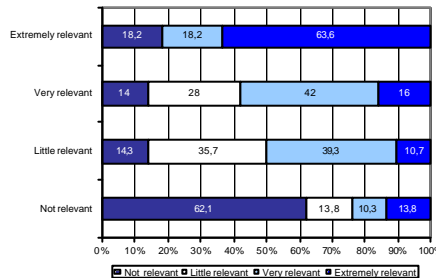
- For the people who are interested in getting information about e-learning thanks to forums, the possibility to have access to e-learning brokers seems very relevant insofar as both tools work thanks to the Internet. That means that while they are chatting on forums to get users' feedbacks, they have the possibility to surf on the web and to compare several providers' catalogues.
- But on the other hand, this solution does not satisfy everyone. Indeed, maybe it could be expensive to spend much time surfing on the web. Some people are also reluctant to use the Internet for that kind of things. But the last reason may be that purchasers are afraid of losing too much time by surfing on the web, where your attention is very quickly distracted.

➤ **E-learning brokers are a good mean to complete the information given by the forums.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: E-learning industry forums freely available and recognized

		Column : Customer customisable course			
		Not relevant	Little relevant	Very relevant	Extremely relevant
En ligne - E-learning - utilisabilité et reconnaissance	Not relevant	62,1	14,3	14	18,2
	Little relevant	13,8	35,7	28	
	Very relevant	10,3	39,3	42	18,2
	Extremely relevant	13,8	10,7	16	63,6
	Total	100	100	100	100

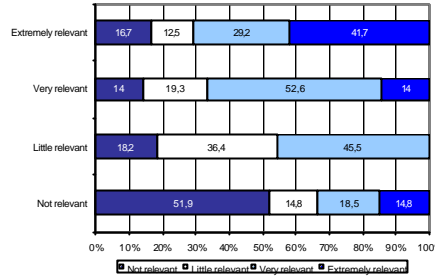


- The most striking result of that question is the fact that people reluctant to use forums are really not interested in getting customer customisable course.
- This reaction may be explained more by the spirit of the company and of the potential purchaser than by the proposal itself. Indeed, the fact that people refuse to use forums is probably linked to the corporate culture, and to the habits especially concerning the use of computers and of the Internet. Actually, lots of companies still restrict the access to the Internet to their employees.
- As a consequence, these companies may prefer some classical e-learning tools, and especially generic courses, simple to use.

➤ **Corporate culture concerning the use of computers and the Internet may have a great influence on their perception of e-learning.**

Line: Recognising trends and problems in continuing training

Tableau: % Colonnes		Column : off the shelf training				
		Not relevant	Little relevant	Very relevant	Extremely relevant	
En ligne: Recognising trends and problems in continuing training	Not relevant	51,9	18,2	14	16,7	
	Little relevant	14,8	36,4	19,3	12,5	
	Very relevant	18,5	45,5	52,6	29,2	
	Extremely relevant	14,8		14	41,7	
	Total	n=9	p=0,001	100	100	100

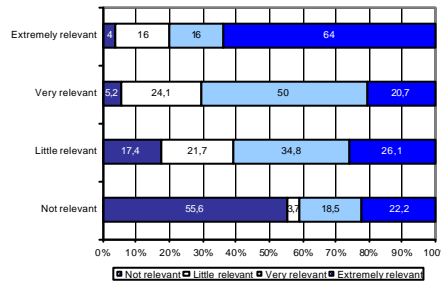


- For the companies which want to improve the quality and the efficiency of their training owing to the recognition of trends and problems in continuing training, the opportunity of "off the shelf training" is considered as very relevant.
- The access to a complete catalogue of products may be the implementation of the recognition of trends and problems. Indeed the HR Directors want to have the possibility to improve their solution with the choice of new product more adapted to the needs of the companies.

➤ **Off the shelf training may be the implementation of the recognition of trends and problems in continuing training.**

Line: Recognising trends and problems in continuing training

Tableau: % Colonnes		Column : transferability & recognition of qualification				
		Not relevant	Little relevant	Very relevant	Extremely relevant	
En ligne: Recognising trends and problems in continuing training	Not relevant	55,6	17,4	5,2	4	
	Little relevant	3,7	21,7	24,1	16	
	Very relevant	18,5	34,8	50	16	
	Extremely relevant	22,2	26,1	20,7	64	
	Total	n=9	p=0,001	100	100	100



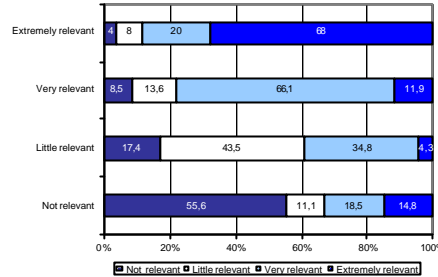
- The main result of this question is that the recognition of trends and problems in continuing training is linked with the efficiency and the pertinence of the training according to the offer and the product already implemented in the company.
- The e-learning suffers from the importance of generic solution which underlines for some companies a risk of inefficiency. We should not forget that the share of the expenditure on e-learning related with the content are very low and the RH directors may be reluctant to invest in a such solution if they can not manage the efficiency of training and be sure of the recognition of it.
- We can notice that this interest is significant in each kind of companies.

➤ **The transferability and recognition of qualification is linked to the wish of efficiency underlined by the companies.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Recognising trends and problems in continuing training

		Column : Easier calculation of ROI			
Tableau: % Colonnes		Not relevant	Little relevant	Very relevant	Extremely relevant
En ligne: Recognising trends and problems in continuing training	Not relevant	55,6	17,4	8,5	4
	Little relevant	11,1	43,5	13,6	8
	Very relevant	18,5	34,8	66,1	20
	Extremely relevant	14,8	4,3	11,9	68
	Total	100	100	100	100



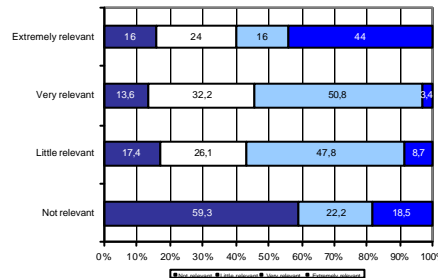
- The return on investment is the key question of the RH department and is the most difficult thing to calculate, that is why this proposition is wished by a majority of companies.
- The two questions are closely linked. In fact when the RH directors are able to recognize in an easier way the trends and problems in continuing training, the calculation of the ROI will be easier.

➤ **The recognition of trends and problems in continuing training may allow an easier calculation of the ROI.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Recognising trends and problems in continuing training

		Column : Availability of generic e-learning brokers			
Tableau: % Colonnes		Not relevant	Little relevant	Very relevant	Extremely relevant
En ligne: Recognising trends and problems in continuing training	Not relevant	59,3	17,4	13,6	16
	Little relevant	26,1	32,2	24	16
	Very relevant	22,2	47,8	50,8	16
	Extremely relevant	18,5	8,7	3,4	44
	Total	100	100	100	100



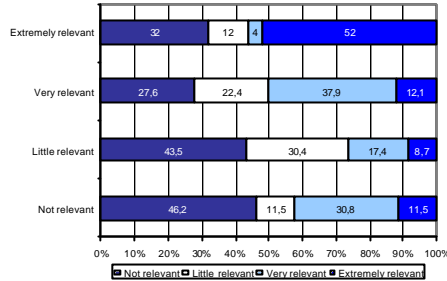
- There is no clear correlation between the recognition of trends and problems in continuing training and the availability of generic e-learning brokers.
- The companies which are very involved in the efficiency problem of e-learning training want in their majority to have access to a complete offer. This is the consequence of the recognition of the trends, they want to have the opportunity to change when they wish for a better solution whoever was their precedent supplier.

➤ **The availability of generic e-learning brokers is wished by a majority of companies but they do not imagine it as a way to improve the efficiency of the training.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: **Recognising trends and problems in continuing training**

Tableau: % Colonnes		Column : Certified training offer				
		Not relevant	Little relevant	Very relevant	Extremely relevant	
En ligne : Recognising continuing training	Not relevant	46,2	43,5	27,6	32	
	Little relevant	11,5	30,4	22,4	12	
	Very relevant	30,8	17,4	37,9	4	
	Extremely relevant	11,5	8,7	12,1	52	
	Total	n=9	p=0,001	100	100	100



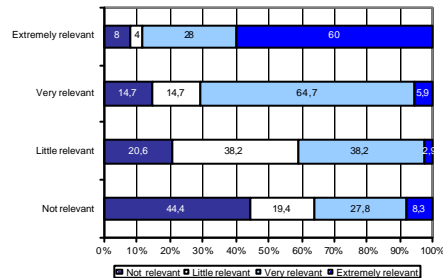
- The certified training offer may be a solution to reassure the companies but in the opposite of the access to off the shelf training, this proposition is not considered as a clear implementation of the recognition of trends and problems in continuing training.
- The certified training offer may limit the necessity of a such system but the companies would better develop their own scale in order to have an offer really efficient in their company and in correlation with their needs.

➤ **The certified training offer may be a complement to off the shelf training but is not an implementation of the recognition of trends and problems in continuing training.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: **Recognising qualification needs**

Tableau: % Colonnes		Column : off the shelf training				
		Not relevant	Little relevant	Very relevant	Extremely relevant	
En ligne : Recognising qualification needs	Not relevant	44,4	20,6	14,7	8	
	Little relevant	19,4	38,2	14,7	4	
	Very relevant	27,8	38,2	64,7	28	
	Extremely relevant	8,3	2,9	5,9	60	
	Total	n=9	p=0,001	100	100	100



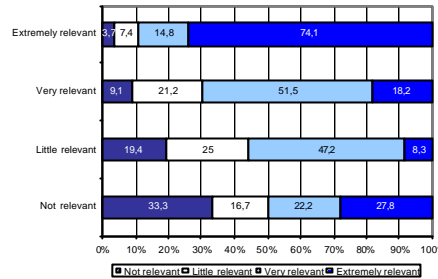
- We can observe that when people are interested in a system which can recognize qualification needs, they also find off the shelf training very relevant.
- In fact, these two proposals may correspond to two different logics from the point of view of the purchasers. Indeed, they may be interested either by controlling the choice of trainings –which can be easier with a system which could identify the real needs- or by letting the trainees choose by themselves.
- It seems that the two proposals satisfy the prospects.

➤ **Prospects are interested by both systems : recognising qualification needs and off the shelf training. Their preference depends on the importance they give to the control of the choice of the training.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Recognising qualification needs

		Column : transferability & recognition of qualification			
Tableau 2					
Colonnes		Not relevant	Little relevant	Very relevant	Extremely relevant
Ligne: Recognising qualification needs	Not relevant	33,3	19,4	9,1	3,7
	Little relevant	16,7	25	21,2	7,4
	Very relevant	22,2	47,2	51,5	14,8
	Extremely relevant	27,8	8,3	18,2	74,1
	Total	100	100	100	100



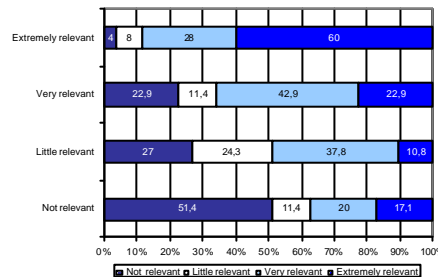
- The possibility to recognize qualification needs within the company and to adapt the training by comparing the different providers is very appreciated.
- In fact, about 90% of the people who are interested in recognising qualification needs find the transferability and recognition of qualification extremely relevant. That shows that if purchasers have the possibility to compare and benchmark providers' different offers, it is a very good mean to adapt the choice of the training to the demand of the employees.

➤ **Companies are very interested in recognising qualification needs and adapt their choice by benchmarking the different providers.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Recognising qualification needs

		Column : Complete integration of HR and e-learning/knowledge management			
Tableau 2					
Colonnes		Not relevant	Little relevant	Very relevant	Extremely relevant
Ligne: Recognising qualification needs	Not relevant	51,4	27	22,9	4
	Little relevant	11,4	24,3	11,4	8
	Very relevant	20	37,8	42,9	28
	Extremely relevant	17,1	10,8	22,9	60
	Total	100	100	100	100

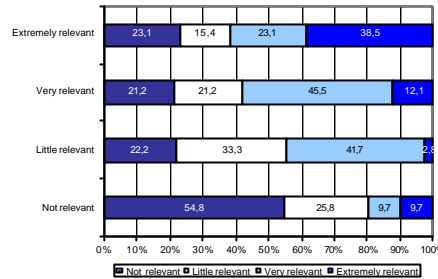


- A complete integration of HR and knowledge management supposes to control the need and the management of information inside the company.
- As a consequence, if Human Resources Department has the possibility to create a system in order to control the demand of qualification and to satisfy it thanks to e-learning solutions, both systems appear very relevant.
- That is why people seems quite enthusiastic about it.

➤ **Recognising qualification needs can be a step toward a complete integration of HR and knowledge management.**

Line: Recognising qualification needs

Tableau: Colonne		Column : Proposing new training to individuals on a permanent basis			
		Not relevant	Little relevant	Very relevant	Extremely relevant
Lin ligne: Recognising qualification needs	Not relevant	54,8	22,2	21,2	23,1
	Little relevant	25,8	33,3	21,2	15,4
	Very relevant	9,7	41,7	45,5	23,1
	Extremely relevant	9,7	2,8	12,1	38,5
	Total	100	100	100	100

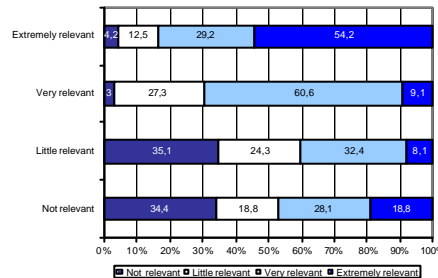


- For people who are interested in recognising qualification needs, the idea of proposing new training to individuals on a permanent basis does not seem so relevant.
- And for a good reason, there is a little contradiction between identifying the needs of the trainees so as to adapt the courses and proposing them new training without asking them what they really need or want.
- So, if the two proposals are interesting separately, they are not very relevant together.

➤ These two proposals are quite in contradiction. Either trainees choose by themselves or HR propose them regularly new trainings.

Line: Recognising qualification needs

Tableau: Colonne		Column : Customisable professional development schemes			
		Not relevant	Little relevant	Very relevant	Extremely relevant
Lin ligne: Recognising qualification needs	Not relevant	34,4	35,1	3	4,2
	Little relevant	18,8	24,3	27,3	12,5
	Very relevant	28,1	32,4	60,6	29,2
	Extremely relevant	18,8	8,1	9,1	54,2
	Total	100	100	100	100



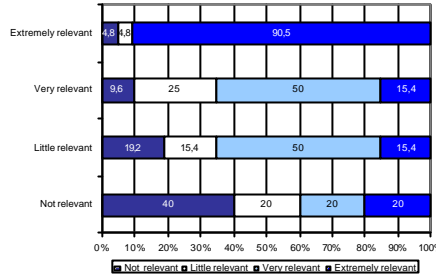
- The hypothesis of recognising qualification needs is originally destined to potential purchasers of e-learning tools, so that they could adapt the training to the needs of the employees.
- On the other hand, customisable professional development schemes were proposed in priority to potential users of e-learning, in order for them to best identify the training adapted to their needs.
- As a result, people may be interested in both solutions, but not necessarily to implement them at the same time.

➤ According to the organisation of the company, these two solutions may be either complementary or completely redundant.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Off the shelf training

		Column : transferability & recognition of qualification			
		Not relevant	Little relevant	Very relevant	Extremely relevant
En ligne : off the shelf training	Not relevant	40	19,2	9,6	4,8
	Little relevant	20	15,4	25	4,8
	Very relevant	20	50	50	
	Extremely relevant	20	15,4	15,4	90,5
	Total	100	100	100	100



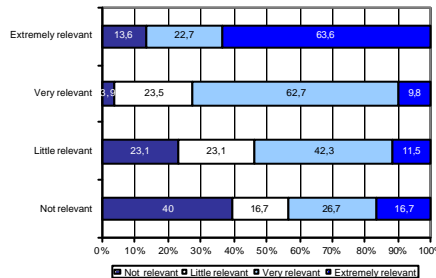
- The proposal of transferability and recognition of qualification seems really essential to convince potential users. Indeed, that supposes to be able to assess the training value of various providers' content in order to align it with the company's own scale.
- So, for the people who are really interested in off the shelf training, it would be a very good tool to help them choose the right training, which is the most adapted to their needs.
- By the way, potential purchasers of e-learning seem really demanding in some tools that allow to benchmark the different offers that exist.

➤ **It is essential to develop off the shelf training and transferability & recognition of qualification at the same time to reassure purchasers and users.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Off the shelf training

		Column : Easier calculation of ROI			
		Not relevant	Little relevant	Very relevant	Extremely relevant
En ligne : off the shelf training	Not relevant	40	23,1	3,9	13,6
	Little relevant	16,7	23,1	23,5	
	Very relevant	26,7	42,3	62,7	22,7
	Extremely relevant	16,7	11,5	9,8	63,6
	Total	100	100	100	100



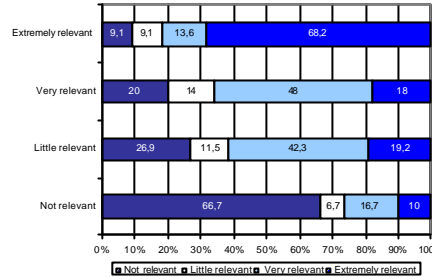
- If a company decides to resort to off the shelf training, it may be interesting for the purchaser to have a tool to control the efficiency of that system.
- Indeed, this opportunity gives much freedom to the users. But, the purchasers must be able to control the use of such a system, to see whether it is worse or better than buying solutions on catalogues for example.
- When the users choose their training themselves and pay them directly on the site, it is essential for the purchaser to assess the ROI of those trainings.

➤ **Purchasers find essential to be able to calculate the ROI of off the shelf training.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Off the shelf training

		Column : Costs management systems			
		Not relevant	Little relevant	Very relevant	Extremely relevant
Line: Off the shelf training	Not relevant	66,7	26,9	20	9,1
	Little relevant	6,7	11,5	14	9,1
	Very relevant	16,7	42,3	48	13,6
	Extremely relevant	10	19,2	18	68,2
	Total	100	100	100	100



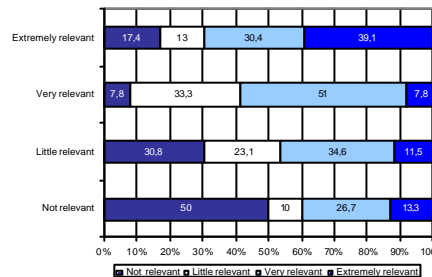
- Developing costs management systems is an essential idea to control training budget and expenditures on off the shelf training.
- This system do not interest Human Resources Directors who do not resort to off the shelf training. Indeed, they already have a budget allocated to training and they can manage their budget without problem.
- On the contrary, when trainees can choose off the shelf training, it is very important for purchasers to give them a rough estimate of the amount they can spend for their training.

➤ **Costs management systems would be a good solution to control expenditures for off the shelf training.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Off the shelf training

		Column : Availability of generic e-learning brokers			
		Not relevant	Little relevant	Very relevant	Extremely relevant
Line: Off the shelf training	Not relevant	50	30,8	7,8	17,4
	Little relevant	10	23,1	33,3	13
	Very relevant	26,7	34,6	51	30,4
	Extremely relevant	13,3	11,5	7,8	39,1
	Total	100	100	100	100



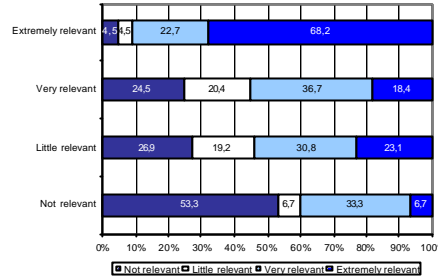
- According to these results, it seems that when a company is thinking of choosing the solution of off the shelf training, the availability of generic e-learning brokers is not very relevant.
- Indeed, the idea is that when the potential users have the possibility to go to online catalogues, they have enough information to choose their training without having to refer to specialized brokers.
- Once again, those who do not find this solution relevant at all are the same who are not ready to resort to web systems. That may be linked with their habits of work.

➤ **People interested by off the shelf training are not likely to resort to generic e-learning brokers.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Off the shelf training

		Column : Complete integration of HR and e-learning/knowledge management			
		Not relevant	Little relevant	Very relevant	Extremely relevant
Line: Off the shelf training	Not relevant	53,3	26,9	24,5	4,5
	Little relevant	6,7	19,2	20,4	4,5
	Very relevant	33,3	30,8	36,7	22,7
	Extremely relevant	6,7	23,1	18,4	68,2
	Total	100	100	100	100



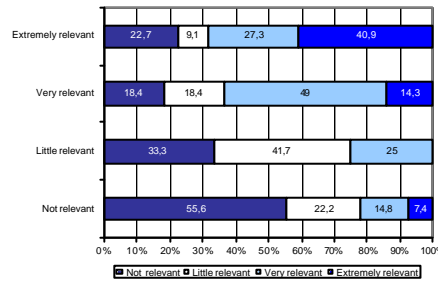
- Off the shelf training could be a good mean to simplify the management of human resources of the company.
- Indeed, one category of people think that maybe in a long run, it could be very interesting to manage Human Resources and Knowledge Management at the same time, with the same tools, and for example, thanks to the management of off the shelf training.

➤ A complete integration of HR and knowledge management can be achieved thanks to solutions such as off the shelf training.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Off the shelf training

		Column : Proposing new training to individuals on a permanent basis			
		Not relevant	Little relevant	Very relevant	Extremely relevant
Line: Off the shelf training	Not relevant	55,6	33,3	18,4	22,7
	Little relevant	22,2	41,7	18,4	9,1
	Very relevant	14,8	25	49	27,3
	Extremely relevant	7,4		14,3	40,9
	Total	100	100	100	100



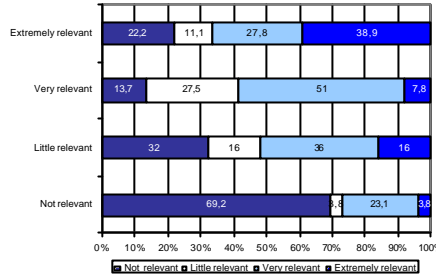
- These two proposals are too similar to be implemented at the same time.
- For example, people who are very enthusiastic about having access to off the shelf training are quite divided about the use of proposing in addition to that, new training to individuals on a permanent basis.
- The idea would be to choose one of these two solutions or possibly to combine them.

➤ It is not very relevant to give access to off the shelf training and to propose training on a permanent basis at the same time.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Off the shelf training

		Column : Interview at regular intervals			
		Not relevant	Little relevant	Very relevant	Extremely relevant
Line: Off the shelf training	Not relevant	69,2	32	13,7	22,2
	Little relevant	3,8	16	27,5	11,1
	Very relevant	23,1	36	51	27,8
	Extremely relevant	3,8	16	7,8	38,9
	Total	100	100	100	100



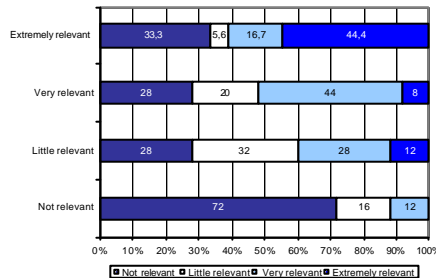
- This question highlights two different logics in the management of e-learning and training. Indeed, the principle of off the shelf training gives the opportunity to the employees to chooses their program themselves.
- On the contrary, the system which plans to interview the trainees at regular intervals supposes to control their work more systematically.
- Both proposals are appreciated, but they may not be very compatible. From another point of view, they can be complementary. That really depends on the culture of the company and of the Human Resources Department.

➤ Off the shelf training and regular interviews with the trainees seem quite contradictory.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Off the shelf training

		Column : On-line staff development consultancy for employees			
		Not relevant	Little relevant	Very relevant	Extremely relevant
Line: Off the shelf training	Not relevant	72	28	28	33,3
	Little relevant	16	32	20	5,6
	Very relevant	12	28	44	16,7
	Extremely relevant	0	12	8	44,4
	Total	100	100	100	100



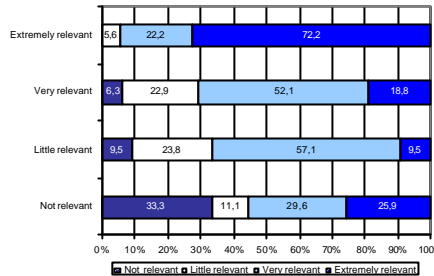
- As well as the latter proposal, the existence of on-line staff development consultancy for employees do not interest much.
- Lots of people may be reluctant to the principle of on-line consultancy. Indeed, the idea to resort to a cyber coach is quite new and not very reassuring for some people.

➤ On-line staff development consultancy for employees is not a very relevant solution.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Off the shelf training

		Column : No specific investment needed to deliver the training			
		Not relevant	Little relevant	Very relevant	Extremely relevant
En ligne : off the shelf training	Not relevant	33,3	9,5	6,3	
	Little relevant	11,1	23,8	22,9	5,6
	Very relevant	29,6	57,1	52,1	22,2
	Extremely relevant	25,9	9,5	18,8	72,2
	Total	100	100	100	100



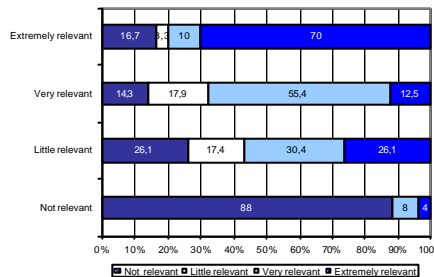
- The possibility to have access to e-learning training with no specific investment needed is very attractive.
- People who are ready to adopt off the shelf training are all the more interested since this possibility would increase the simplicity of use of e-learning.
- Even the people who are not really convinced by off the shelf training seem to find this possibility quite relevant.
- And for good reason, we have already observed that for users or potential clients, one of the main advantage of e-learning is its simplicity of use. It is important to develop tools which do not require specific equipment.

➤ **The possibility of developing e-learning with no specific investment would be a good way to optimise the use of off the shelf training.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Easier calculation of ROI

		Column : Costs management systems			
		Not relevant	Little relevant	Very relevant	Extremely relevant
En ligne : Easier calculation of ROI	Not relevant	88	26,1	14,3	16,7
	Little relevant		17,4	17,9	3,3
	Very relevant	8	30,4	55,4	10
	Extremely relevant	4	26,1	12,5	70
	Total	100	100	100	100



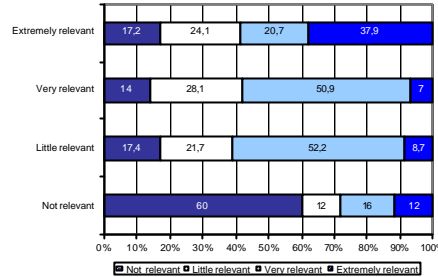
- We can very easily distinguish two categories of interlocutors here.
- The first category is made up of people who are not particularly interested in e-learning or at least who are not thinking of investing in e-learning in the short run. As a consequence, these people do not need to calculate the ROI or to develop costs management systems.
- On the contrary, for potential clients -users or purchasers- easier calculation of ROI seem to go hand in hand with costs management systems.

➤ **Potential clients are very interested in both systems of costs management and calculation of ROI.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Easier calculation of ROI

		Column : Availability of generic e-learning brokers			
Tableau : % Colonne		Not relevant	Little relevant	Very relevant	Extremely relevant
Ligne : Easier calculation of ROI	Not relevant	60	17,4	14	17,2
	Little relevant	12	21,7	28,1	24,1
	Very relevant	16	52,2	50,9	20,7
	Extremely relevant	12	8,7	7	37,9
	Total	100	100	100	100



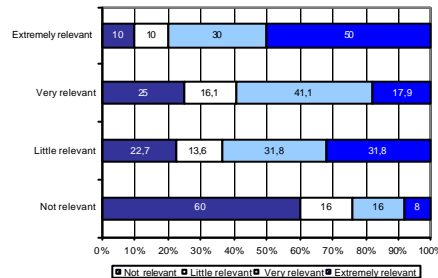
- According to this figures, we notice that the people who would like to benefit from an easier calculation of ROI, are not very interested by the availability of generic e-learning brokers.
- Actually, it seems that the people who are interested in calculating the ROI are only the purchasers of the training and not the users. So we could imagine that they let the trainees choose their training themselves and they only control the budget.
- The other hypothesis is that the purchasers prefer choosing themselves according to financial criteria rather than letting users choose.

➤ Purchasers may favour financial criteria to buy e-learning solutions for their company.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Easier calculation of ROI

		Column : Complete integration of HR and e-learning /knowledge management			
Tableau : % Colonne		Not relevant	Little relevant	Very relevant	Extremely relevant
Ligne : Easier calculation of ROI	Not relevant	60	22,7	25	10
	Little relevant	16	13,6	16,1	10
	Very relevant	16	31,8	41,1	30
	Extremely relevant	8	31,8	17,9	50
	Total	100	100	100	100



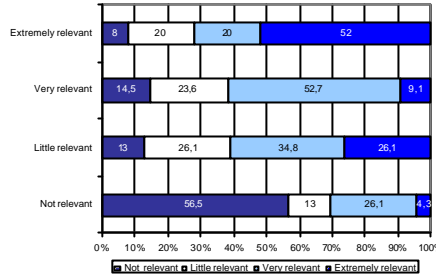
- People are quite divided on that point.
- Indeed, the problem must come from the fact some people who answered do not see clearly how they could implement a complete integration of HR and knowledge management.
- The impression that we can have is that they could be interested by the project itself, most particularly on the level of profitability, but without having any visibility on it. That may be why they do not consider it as a priority.

➤ The complete integration of HR and Knowledge Management may be an interesting project in the long run but it is not a priority for the moment.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Easier calculation of ROI

		Column: Customisable professional development schemes			
		Not relevant	Little relevant	Very relevant	Extremely relevant
Tableau 3: Colonne: Easier calculation of ROI	Not relevant	56,5	13	14,5	8
	Little relevant	13	26,1	23,6	20
	Very relevant	26,1	34,8	52,7	20
	Extremely relevant	4,3	26,1	9,1	52
	Total	100	100	100	100



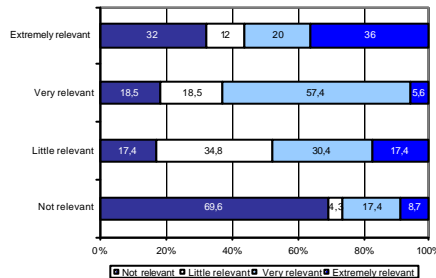
- More than 70% of the people who want to have a good visibility on the investments of the company are interested by the existence of customisable professional development schemes.
- Indeed, it could be a very good solution to define precisely which kind of training each employee need. And this way, the purchasers could really adapt the training to the demand.
- But, as we will see later, it seems that the potential purchasers are not ready to adopt such solutions for the moment, in order not to lose their budgetary control.

➤ Customisable professional development schemes could a good solution to optimise the investments in training.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Easier calculation of ROI

		Column: Interview at regular intervals			
		Not relevant	Little relevant	Very relevant	Extremely relevant
Tableau 3: Colonne: Easier calculation of ROI	Not relevant	69,6	17,4	18,5	32
	Little relevant	4,3	34,8	18,5	12
	Very relevant	17,4	30,4	57,4	20
	Extremely relevant	8,7	17,4	5,6	36
	Total	100	100	100	100



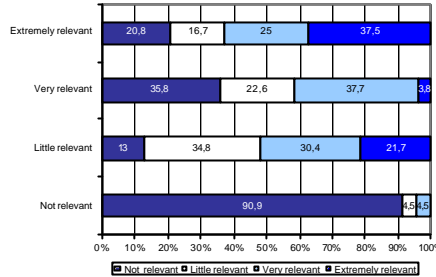
- Surprisingly enough, we can observe on this slide and on the next one, that the people interested in an easier calculation of ROI -mainly purchasers as we explained earlier- are not convinced by the importance of carrying out interviews with the trainees at regular intervals in order to probe their interest for specific training.
- There are two possible explanations. Either they just want to control the choice and the purchase of the training, or they are afraid of wasting too much money with these interviews.

➤ Purchasers are afraid of wasting time and money with interviews of the trainees.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Easier calculation of ROI

		Column: On-line staff development consultancy for employees			
		Not relevant	Little relevant	Very relevant	Extremely relevant
Tableau % Colonnes	Not relevant	90,9	13	35,8	20,8
	Little relevant	4,5	34,8	22,6	16,7
	Very relevant	4,5	30,4	37,7	25
	Extremely relevant		21,7	3,8	37,5
	Total	n=9 p=0,001	100	100	100



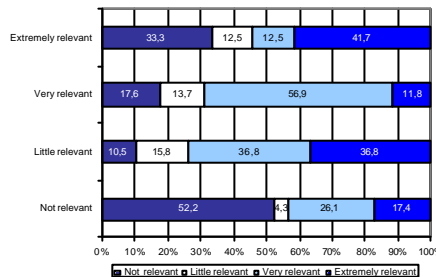
- This proposal is quite similar to the latter one.
- Indeed, whether the interviews are done by the trainees themselves or through on-line staff development consultancy for employees, the interest of potential purchasers is very limited.
- The main reason is the risk of wasting time and money with a tool that will not be used by the trainees.
- We can also note that for the 90% of the people who are not interested in an easier calculation of ROI, on-line consultancy for employees is not relevant at all.

➤ **On-line staff development consultancy for employees is not a system to develop at the moment, because people do not need it.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Easier calculation of ROI

		Column: No restriction to train individual or teams			
		Not relevant	Little relevant	Very relevant	Extremely relevant
Tableau % Colonnes	Not relevant	52,2	10,5	17,6	33,3
	Little relevant	4,3	15,8	13,7	12,5
	Very relevant	26,1	36,8	56,9	12,5
	Extremely relevant	17,4	36,8	11,8	41,7
	Total	n=9 p=0,001	100	100	100



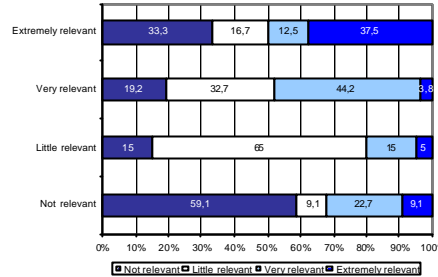
- Once again, the point of view which stands out on that slide is the fact that the cost is a very important parameter in the choice of modalities of an e-learning system.
- Indeed, even if we observed that the flexibility of e-learning training is one of its advantages, it is not necessarily a good argument to convince purchasers who also look for the profitability of their investment.
- So we have the impression that if flexibility is part of e-learning solutions, it must not be uncontrolled.

➤ **Purchasers seem to be afraid of a too large flexibility of use of e-learning. They may want to control the use of the trainings in order to make their investment profitable.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Easier calculation of ROI

		Column : Use of virtual reality rooms/helmets			
		Not relevant	Little relevant	Very relevant	Extremely relevant
Tableau : Colonnes	Not relevant	59,1	15	19,2	33,3
	Little relevant	9,1	65	32,7	16,7
	Very relevant	22,7	15	44,2	12,5
	Extremely relevant	9,1	5	3,8	37,5
	Total	100	100	100	100



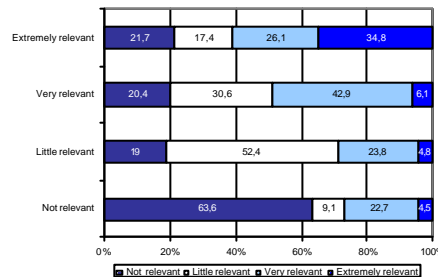
- Generally speaking, prospects -whether potential users or purchasers- are not interested by the use of virtual reality rooms or helmets.
- There may be two reasons : first, people do not know this system enough to know whether it is really efficient or not. And, from the point of view of the purchasers, this kind of equipment must represent a very expensive investment and too risky.

➤ **The use of virtual reality rooms or helmets is not to be developed immediately.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Easier calculation of ROI

		Column : system integration services			
		Not relevant	Little relevant	Very relevant	Extremely relevant
Tableau : Colonnes	Not relevant	63,6	19	20,4	21,7
	Little relevant	9,1	52,4	30,6	17,4
	Very relevant	22,7	23,8	42,9	26,1
	Extremely relevant	4,5	4,8	6,1	34,8
	Total	100	100	100	100



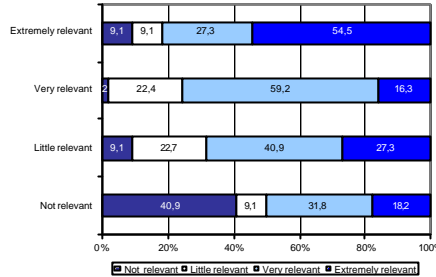
- The proposal of "system integration services" is supposed to allow to manage complex multi-actors project and to be able to deliver the training of one provider using another provider LMS.
- People do not seem really enthusiastic about this idea, because they certainly do not plan to lead multi-actors projects for the moment. And, as they have not got to know elearning well, it may be a bit too early to be thinking of such important projects.

➤ **System integration services are not considered as a very urgent need for prospects.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Easier calculation of ROI

		Column: No specific investment needed to deliver the training			
		Not relevant	Little relevant	Very relevant	Extremely relevant
Tableau: % Colonne	Not relevant	40,9	9,1	2	9,1
	Little relevant	9,1	22,7	22,4	9,1
	Very relevant	31,8	40,9	59,2	27,3
	Extremely relevant	18,2	27,3	16,3	54,5
	Total	100	100	100	100



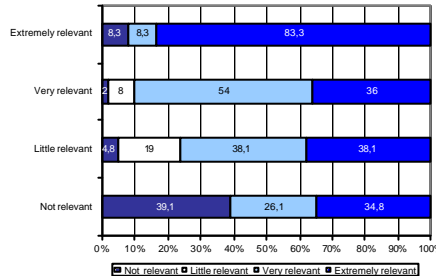
- As we noticed earlier, it seems that the people who find an easier calculation of ROI are mainly the potential purchasers of e-learning much more than potential users.
- That is why it appears clearly that all the people who answered to that question seem globally very interested by a system which would require no specific investment to deliver the training.
- Indeed, it would be one good point to limit the cost of the training and as a result, the ROI.

➤ A system which would require no specific investment would be a good solution to influence the ROI.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Easier calculation of ROI

		Column: Inclusion of corporate knowledge			
		Not relevant	Little relevant	Very relevant	Extremely relevant
Tableau: % Colonne	Not relevant	39,1	4,8	2	8,3
	Little relevant	19	8		
	Very relevant	26,1	38,1	54	8,3
	Extremely relevant	34,8	38,1	36	83,3
	Total	100	100	100	100



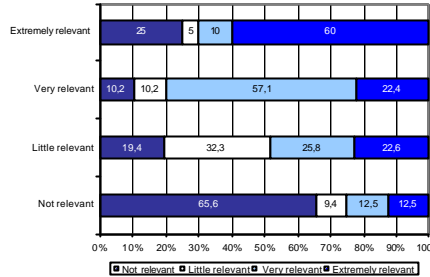
- For this question, people have certainly answered from two different points of view : the potential user's and the potential purchaser's ones.
- The possibility to include corporate knowledge in every generic or specific course is a very relevant idea for more than 75% of the people who answered that question.
- Indeed, for the purchasers, that means that they could buy generic course, obviously cheaper than tailor made ones. But, by including corporate knowledge, they would have the possibility to adapt the courses and to make them as efficient as possible. In other words, they could increase easily the ROI.
- At the same time, for the user, having access to that kind of course must be much more interesting and practical than any other generic course.

➤ The inclusion of corporate knowledge would satisfy both users and purchasers, thanks to a potentially high ROI.

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Availability of generic e-learning brokers

		Column : Complete integration of HR and e-learning/knowledge management			
Tableau: % Colonnes		Not relevant	Little relevant	Very relevant	Extremely relevant
En ligne: Availability of generic e-learning brokers K12-2538	Not relevant	65,6	19,4	10,2	25
	Little relevant	9,4	32,3	10,2	5
	Very relevant	12,5	25,8	57,1	10
	Extremely relevant	12,5	22,6	22,4	60
	Total	100	100	100	100



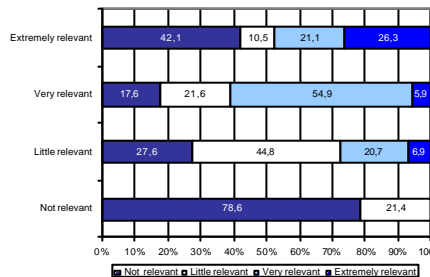
- The correlation between the availability of generic e-learning brokers and a complete integration of HR and elearning management is important.
- The companies wish in order to improve the efficiency of the RH department to have access and information about all the solutions which could be implemented by the providers.
- Moreover this solution underlines the possibility of having a supplier and choosing courses from an other without difficulty. That is why this proposition is so promoted by the companies and specially the RH department.

➤ **The availability of generic e-learning brokers is one of the solution to improve the efficiency of the RH department.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Availability of generic e-learning brokers

		Column : Giving individuals an access to complete catalogues of learning resources			
Tableau: % Colonnes		Not relevant	Little relevant	Very relevant	Extremely relevant
En ligne: Availability of generic e-learning brokers K12-2538	Not relevant	78,6	27,6	17,6	42,1
	Little relevant	21,4	44,8	21,6	10,5
	Very relevant	20,7	54,9	21,1	21,1
	Extremely relevant	6,9	5,9	26,3	6,9
	Total	100	100	100	100



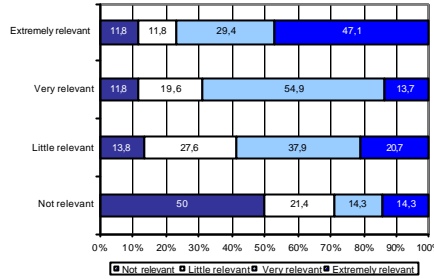
- This slide clearly shows the position of the prospects between elearning brokers or individuals' having access to catalogues.
- Indeed, even though they find very relevant to resort to elearning brokers, they are quite opposed to giving access to catalogues.
- The point is that they certainly do not want all the employees of the company to choose which kind of training they wish to have. It would be very difficult to manage, to control and to centralize the information and the different demands.

➤ **The companies are not ready to give individuals an access to catalogues. E-learning brokers seem more efficient.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Availability of generic e-learning brokers

		Column: Customisable professional development schemes			
Tableau: % Colonnes		Not relevant	Little relevant	Very relevant	Extremely relevant
K1 En ligne: Availability of generic e-learning brokers	Not relevant	50	13,8	11,8	11,8
	Little relevant	21,4	27,6	19,6	11,8
	Very relevant	14,3	37,9	54,9	29,4
	Extremely relevant	14,3	20,7	13,7	47,1
	Total	100	100	100	100



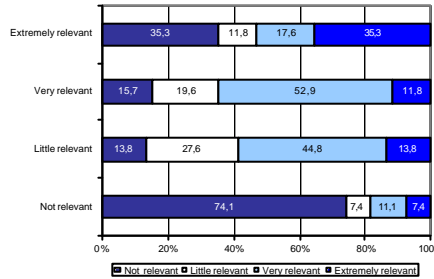
- The striking result on this slide is the correlation of the availability of generic e-learning brokers and customisable professional development schemes.
- The opportunity to compare all e-learning solutions in order to implement the one which could resolve the training problem of the company is very relevant if you have different profiles of employees involved in e-learning program.
- This solution is all the more interesting for the companies than it supposes a cut on training costs and you can train small group of employees. According to the result on the first slide of the profile section, this evolution could be very efficient in the promotion of e-learning when you focus on the sector reluctant today to use e-learning.

➤ **The generic e-learning brokers and a global offer may be a solution to customize professional development schemes and attract new clients.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Availability of generic e-learning brokers

		Column: Interview at regular intervals			
Tableau: % Colonnes		Not relevant	Little relevant	Very relevant	Extremely relevant
K2 En ligne: Availability of generic e-learning brokers	Not relevant	74,1	13,8	15,7	35,3
	Little relevant	7,4	27,6	19,6	11,8
	Very relevant	11,1	44,8	52,9	17,6
	Extremely relevant	7,4	13,8	11,8	35,3
	Total	100	100	100	100



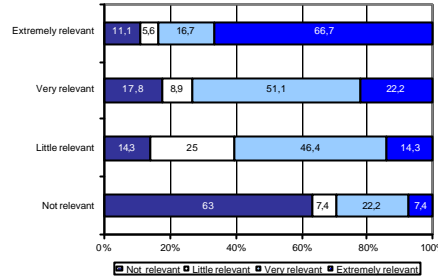
- The interview is not considered by the companies as an alternative to the development of generic e-learning brokers.
- This proposition supposes to give more autonomy to the employee in the choice of their training. We have notice in the precedent slides that this trend is not really widespread in companies.
- However when the company preserve this habit, they agree with this proposition because it involved an implication of the employees in their training and it could allow the creation of the company's own scale.

➤ **Interview at regular times may not be considered as an alternative to the development of generic e-learning brokers.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Availability of generic e-learning brokers

		Column : No restriction to train individual or teams			
Tableau: % Colonnes		Not relevant	Little relevant	Very relevant	Extremely relevant
K1 K2 K3 K4 K5 K6 K7 K8 K9 K10 K11 K12 K13 K14 K15 K16 K17 K18 K19 K20 K21 K22 K23 K24 K25 K26 K27 K28 K29 K30 K31 K32 K33 K34 K35 K36 K37 K38 K39 K40 K41 K42 K43 K44 K45 K46 K47 K48 K49 K50 K51 K52 K53 K54 K55 K56 K57 K58 K59 K60 K61 K62 K63 K64 K65 K66 K67 K68 K69 K70 K71 K72 K73 K74 K75 K76 K77 K78 K79 K80 K81 K82 K83 K84 K85 K86 K87 K88 K89 K90 K91 K92 K93 K94 K95 K96 K97 K98 K99 K100	Not relevant	6,3	14,3	17,8	11,1
	Little relevant	7,4	25	8,9	5,6
	Very relevant	22,2	46,4	51,1	16,7
	Extremely relevant	7,4	14,3	22,2	66,7
	Total	100	100	100	100



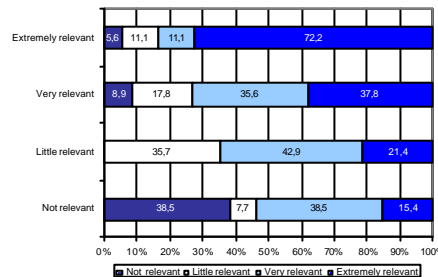
- The capacity to train individual or team may be easier when you have access to a large catalogue of training products.
- The mix of these two propositions is the possibility to choose all the kind of e-learning products when the company need it for its employees without the problem of cost.
- The opponents are reluctant to a large part of propositions. We can suppose that the access to the product is not a key question in their opposition to e-learning.

➤ **HR directors promote the access to all elearning products to train individual or teams without restriction**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Availability of generic e-learning brokers

		Column : Deliver the training at any time/any place			
Tableau: % Colonnes		Not relevant	Little relevant	Very relevant	Extremely relevant
K1 K2 K3 K4 K5 K6 K7 K8 K9 K10 K11 K12 K13 K14 K15 K16 K17 K18 K19 K20 K21 K22 K23 K24 K25 K26 K27 K28 K29 K30 K31 K32 K33 K34 K35 K36 K37 K38 K39 K40 K41 K42 K43 K44 K45 K46 K47 K48 K49 K50 K51 K52 K53 K54 K55 K56 K57 K58 K59 K60 K61 K62 K63 K64 K65 K66 K67 K68 K69 K70 K71 K72 K73 K74 K75 K76 K77 K78 K79 K80 K81 K82 K83 K84 K85 K86 K87 K88 K89 K90 K91 K92 K93 K94 K95 K96 K97 K98 K99 K100	Not relevant	38,5	8,9	5,6	
	Little relevant	7,7	35,7	17,8	11,1
	Very relevant	38,5	42,9	35,6	11,1
	Extremely relevant	15,4	21,4	37,8	72,2
	Total	100	100	100	100



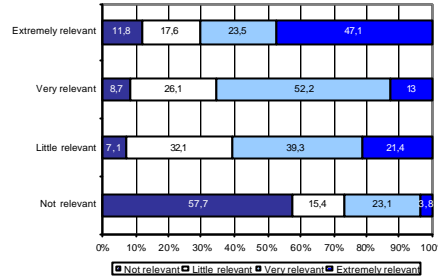
- According to the precedent results, availability of generic e-learning brokers is understood by a majority of the companies as a mean of flexibility.
- Moreover the wish of the companies which want to available generic e-learning brokers is to have a new way of training without the most common training constraints : number of people involved in the training and the time and place of delivering.

➤ **The restriction of the training constraints may be the most important expectation of HR directors concerning e-learning.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Availability of generic e-learning brokers

		Column: High bandwidth for everybody allowing videoconference..			
Tableau: % Colonnes		Not relevant	Little relevant	Very relevant	Extremely relevant
K1 En ligne: Availability of generic e-learning broker	Not relevant	57,7	7,1	8,7	11,8
	Little relevant	15,4	32,1	26,1	17,6
	Very relevant	23,1	39,3	52,2	23,5
	Extremely relevant	3,8	21,4	13	47,1
	Total	100	100	100	100



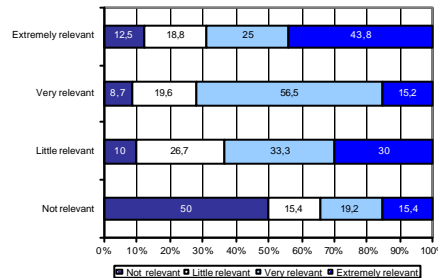
- Surprisingly enough the availability of generic e-learning brokers is not deeply linked with the development in the companies of high bandwidth . The access to all the products is not planned for all the employees even if they promote in the same time training at any time and any place.
- These results confirm the hypothesis we draw in the precedent slides. Efficiency and flexibility are key concepts in HR departments but it must be organize by the department and the indirect cost of e-learning restrains the choice.
- Despite the advantage of own training, the companies are reluctant to allow individuals to engage funds.

➤ **High bandwidth are not a priority in RH department in opposition with availability of generic e-learning brokers or ROI calculation.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Availability of generic e-learning brokers

		Column : Systematic certification			
Tableau: % Colonnes		Not relevant	Little relevant	Very relevant	Extremely relevant
K4 En ligne: Availability of generic e-learning broker	Not relevant	50	10	8,7	12,5
	Little relevant	15,4	26,7	19,6	18,8
	Very relevant	19,2	33,3	56,5	25
	Extremely relevant	15,4	30	15,2	43,8
	Total	100	100	100	100



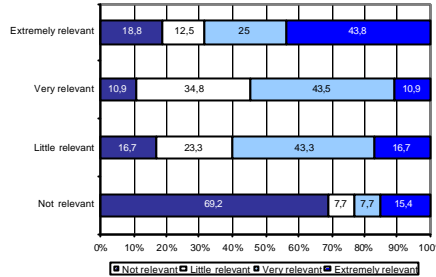
- The systematic certification is not a primordial aim and may not be a relevant commercial advantage for the potential customers.
- These results are quite surprising because in the same time the companies underline the necessity of the calculation of the return on investment and do not strongly promote the certification.
- The conception of the RH management are not based on individuals and some key advantages of e-learning may not be presented because of this divergence of interest.

➤ **The systematic certification may be a potential evolution but seems not to become a commercial advantage.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Availability of generic e-learning brokers

Tableau: % Colonnes		Column : Customer customisable course			
		Not relevant	Little relevant	Very relevant	Extremely relevant
K1 En ligne - Availability of generic e-learning broker	Not relevant	69,2	16,7	10,9	18,8
	Little relevant	7,7	23,3	34,8	12,5
	Very relevant	7,7	43,3	43,5	25
	Extremely relevant	15,4	16,7	10,9	43,8
	Total	9	100	100	100



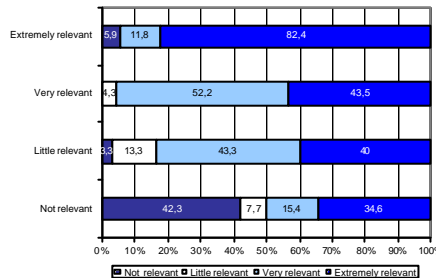
- There is no clear link between the availability of generic e-learning brokers and customer customisable course.
- For a good reason, if the brokers allow to browse providers' catalogues of generic training, there are little chance to have access to customisable courses thanks to brokers.
- Although brokers are very demanded by prospects, as well as cust omisable courses, people are not convinced by the two solutions at the same time.

➤ **Brokers may not give access to customisable courses.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Availability of generic e-learning brokers

Tableau: % Colonnes		Column : Inclusion of corporate knowledge			
		Not relevant	Little relevant	Very relevant	Extremely relevant
K2 En ligne - Availability of generic e-learning broker	Not relevant	42,3	3,3		5,9
	Little relevant	7,7	13,3	4,3	
	Very relevant	15,4	43,3	52,2	11,8
	Extremely relevant	34,6	40	43,5	82,4
	Total	9	100	100	100



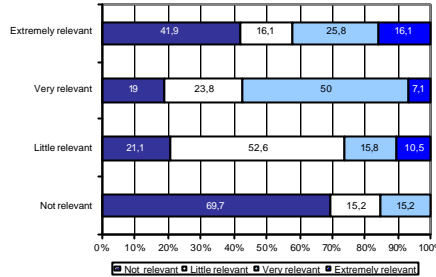
- Generally speaking, the possibility to include corporate knowledge in generic training has been very appreciated.
- This solution would allow purchasers to buy generic training and to adapt them very precisely to the needs of the company. That could represent a very profitable investment.
- Further more, for the employees, this customised training could be much more concrete and directly linked with their work in the company.

➤ **The combination of e-learning brokers and inclusion of corporate knowledge is an extremely relevant solution.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Complete integration of HR and e-learning/knowledge management

		Column : Giving individuals an access to complete catalogues of learning resources			
Tableau: %					
Colonnes		Not relevant	Little relevant	Very relevant	Extremely relevant
Ligne: Complete integration of HR and e-learning/knowledge management	Not relevant	69,7	21,1	19	41,9
	Little relevant	15,2	52,6	23,8	16,1
	Very relevant	15,2	15,8	50	25,8
	Extremely relevant		10,5	7,1	16,1
	Total	n=9	p=0,001	100	100



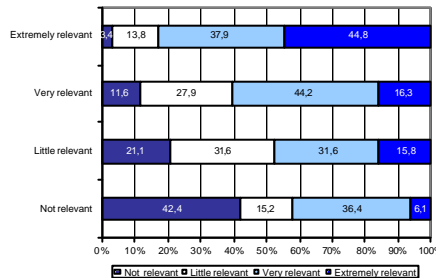
- There is no clear link between integration of Human Resources and e-learning management and the access of employees to complete catalogues of learning resources.
- This kind of catalogues are not encourage by the HR directors because they may consider the training as one of the most important goal of their job. The culture of the sector is today the main problem to the development of this solution.
- The cost of the solution and the problem of the definition of the employees involved in this program may do the RH directors reluctant to this project.

➤ **Even if the companies wish the integration of HR and e-learning management, they are reluctant to accept giving individuals access to catalogues.**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Complete integration of HR and e-learning/knowledge management

		Column : Customisable professional development schemes			
Tableau: %					
Colonnes		Not relevant	Little relevant	Very relevant	Extremely relevant
Ligne: Complete integration of HR and e-learning/knowledge management	Not relevant	42,4	21,1	11,6	3,4
	Little relevant	15,2	31,6	27,9	13,8
	Very relevant	36,4	31,6	44,2	37,9
	Extremely relevant	6,1	15,8	16,3	44,8
	Total	n=9	p=0,001	100	100

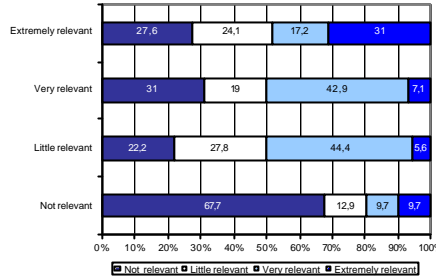


- The position of the companies concerning the integration of RH and e-learning management can be related with their opinion on customisable professional development schemes. Indeed e-learning may be seen as a flexible mean.
- The companies do not want to allow their employees to have an access to complete catalogue but the HR director want to reach the result of this proposition owing to e-learning. We may forecast that the HR will manage the e-learning as an other way of training and do not wish to develop the autonomy of their employees. This impression could explain the results on page 167.

➤ **E-learning is considered as a mean of training and should be integrated to the RH management to improve customisable professional development schemes.**

Line: Complete integration of HR and e-learning/knowledge management

		Column : On-line staff development consultancy for employees			
Tableau: % Colonnes		Not relevant	Little relevant	Very relevant	Extremely relevant
Ligne: Complète l'intégration de l'apprentissage en ligne / la gestion des connaissances	Not relevant	67,7	22,2	31	27,6
	Little relevant	12,9	27,8	19	24,1
	Very relevant	9,7	44,4	42,9	17,2
	Extremely relevant	9,7	5,6	7,1	31
	Total	n=9 p=0,001	100	100	100

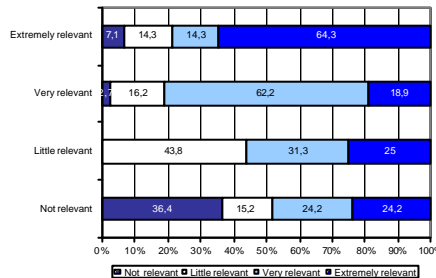


- This result can be compared with the precedent ones. In fact the flexibility involved by this proposition is wished by the company but the survey deals with the impressions of HR directors. In the culture the HR department is responsible for all the decisions concerning training, so the proposition, which generate an increase of the autonomy of employees, raises some oppositions.
- There is no clear correlation between integration of HR and elearning management but the HR department wants to promote flexibility and efficiency and in the same time wants to control the training.

➤ **The autonomy of the employees raises some oppositions in the companies despite the advantages it could promote in the training efficiency.**

Line: Complete integration of HR and e-learning/knowledge management

		Column : Deliver the training at any time/any place			
Tableau: % Colonnes		Not relevant	Little relevant	Very relevant	Extremely relevant
Ligne: Complète l'intégration de l'apprentissage en ligne / la gestion des connaissances	Not relevant	36,4		2,7	7,1
	Little relevant	15,2	43,8	16,2	14,3
	Very relevant	24,2	31,3	62,2	14,3
	Extremely relevant	24,2	25	18,9	64,3
	Total	n=9 p=0,001	100	100	100



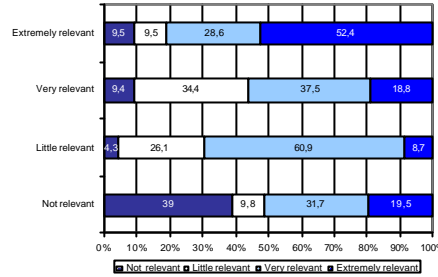
- The companies which want to increase their training efficiency with an integration of e-learning and HR management underline the importance of flexibility in their choice of an e-learning solution.
- This proposition is one of the most popular in the companies especially in HR department which deals with the different problem of training. We can notice that this proposition is the same time one of the most abstract.

➤ **A training adapted to the needs (place and moment) is the goal of the HR department**

Context & objectives - Approach & methodology - Conclusions & recommendations - **Statistic Analysis**

Line: Certified training offer

Tableau: % Colonnes		Column : Systematic certification			
		Not relevant	Little relevant	Very relevant	Extremely relevant
Ligne : Certified training offer	Not relevant	39	4,3	9,4	9,5
	Little relevant	9,8	26,1	34,4	9,5
	Very relevant	31,7	60,9	37,5	28,6
	Extremely relevant	19,5	8,7	18,8	52,4
Total		100	100	100	100



- We can notice that the existence of a certified training offer do not change the position of the companies concerning a systematic certification. The companies do not imagine this certification as an alternative to a certified training offer.
- Furthermore the companies wish in the same time the certification and a certified offer. The companies have never used e-learning and wish to have some points of reference with a certified offer. The certification is the confirmation of the retention of information and efficiency of the learning.
- The companies want to have references but want in the same time to compare them with the company own scale.

➤ **The companies want to have references but want in the same time to compare them with the company own scale.**