

THE **e**LEARNING DEVELOPERS' JOURNAL

Strategies and Techniques for Designers,
Developers, and Managers of eLearning

JOURNAL™

THIS WEEK — MANAGEMENT STRATEGIES

Building an e-Learning Strategy that Keeps Pace with Business Dynamics

BY WAYNE GOLDSTEIN

Organizations have created a myriad of internal initiatives to bolster enterprise performance. Among them, e-Learning has emerged to assume a strategic role in the organization, shifting from a simple solution for creating training efficiency, to one that aligns individual competencies to impact bottom line performance.

With every corporate goal there is a set of intellectual resources and capabilities that are critical to its success. Simply put,

in order for a company to compete successfully there are things it must know, and things it must know how to do well. Consequently, the choices a company makes — from the technologies it implements to the products it creates and the markets it serves — all have a sizable impact on the knowledge, skills and competencies required to succeed. And of course, this is true for other organizations as well, whether companies, higher education, government, and so on. Nearly all of the points I will make in this article apply across the board, even though, for consistency, the words “company” and “corporate” will keep appearing.

When used strategically, e-Learning can be the critical element that aligns

individual development, resources, and capabilities with corporate goals. It can be the catalyst to improved performance at all levels of the organization. To begin with, organizations must shift their present perspective of e-Learning from being just a vehicle for delivering content, to being one that offers tremendous opportunity for making learning a much richer, more meaningful experience. With an eye on key elements — and a focus on balance — bottom line impact can be achieved.

Key characteristics of a strategic e-Learning program

E-Learning strategy must account for issues of culture, leadership, change, business challenges and trends, and

e-Learning is properly understood as part of overall business process, and not simply as an end in itself. This calls for additional kinds of “blending.” Learning strategy must arise out of business strategy, and it must include a way to reconnect to on-the-job application. In this article, a pioneer in online mentoring and virtual practice environments shows you the steps to achieve this double connection, and to further your success!

Extra Insights
on page 7

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The eLearning Developers' Journal™ is designed to serve as a catalyst for innovation and as a vehicle for the dissemination of new and practical strategies and techniques for e-Learning designers, developers and managers. The **Journal** is not intended to be the definitive authority. Rather, it is intended to be a medium through which e-Learning practitioners can share their knowledge, expertise and experience with others for the general betterment of all.

As in any profession, there are many different perspectives about the best strategies, techniques and tools one can employ to accomplish a specific objective. This **Journal** will share different perspectives and does not position any one as "the right way," but rather we position each article as "one of the right ways" for accomplishing a goal. We assume that readers will evaluate the merits of each article and use the ideas they contain in a manner appropriate for their specific situation.

The articles contained in the **Journal** are all written by people who are actively engaged in this profession — not by paid journalists or writers. Submissions are always welcome at any time, as are suggestions for articles and future topics. To learn more about how to submit articles and/or ideas, please visit:
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long-term business results. Key elements include:

- A plan to align objectives with organizational goals
- Buy-in from management and participants
- A blended environment for learning and performance enhancement
- Internal marketing and promotion
- Follow-through

The plan

The most successful e-Learning initiatives are designed with results in mind. An organization must be able to articulate expectations in terms of how e-Learning will support its goals. Begin by identifying specific needs, which can be turned into business objectives for an e-Learning program. When accomplished, these business objectives should directly support the strategic objectives of the organization. To establish a list of desired results that map directly to business objectives:

1. Identify business direction, needs, and goals.
2. Compare these to the existing workforce skills the company has.
3. Identify gaps between what the company has and what's required to achieve future goals.
4. Perform a SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats). Start by holding a team meeting with management from each department that will be influenced by the e-Learning initiative. Conduct a SWOT analysis of the company to determine e-Learning's role.
 - Strengths — What does the company do well? What does it do better than any competitor?
 - Weaknesses: Where is the company falling short in the market? What issues are keeping it from leveraging new opportunities?
 - Opportunities: What are the opportunities the organization is poised to pursue? Look at market trends and shifts in customer and stakeholder dynamics.
 - Threats: If the organization fails to improve in key areas, what will threaten its place in the market? Are there technology and industry or regulatory concerns that should be addressed? What issues are influenced by the economy?
5. Have clear job descriptions and required skills for each position within

the organization.

6. Identify the training and development needs for each position.

Once these steps toward establishing a vision and a plan for the e-Learning initiative have been taken (see Sidebar 1, "Key e-Learning questions," below), specific training objectives to achieve organization goals can be set for individuals. Likewise, departments should have team objectives for improving skills and performance. To clarify desired results and establish accountability, participants should be given concrete, measurable objectives and deadlines.

Buy-in

Support from both management and employees in the organization can accelerate learning and progress, while indifference will undermine it. Once the strategic plan is created, leadership support should be established and maintained for two reasons:

1. Initiatives are successful when they have the support of company leaders who are respected by employees or who are in a position to influence their careers.
2. Having the management team involved enables the organization to change training direction or course content if it's determined that a department is not aligned with the company's strategy.

SIDEBAR 1 Key e-Learning questions

A strategic plan for e-Learning should answer the following questions:

1. What elements are necessary to ensure that training goals and individual development are aligned with the organization's goals?
2. Who will participate in this training initiative? Identify individuals and job functions.
3. What are the desired results and benefits of training for those participating? For the organization?
4. How will results be identified and measured?
5. What resources are required to implement this training initiative? Consider staff, services, hardware and software, and budget.
6. What could inhibit or sabotage this initiative's success?

The success of any corporate initiative is directly linked to the degree of leadership buy-in. Management has tremendous influence on determining the success of any program, so bringing them into the process early will ensure the initiative receives the support it needs. Involving management in a situation analysis during the planning phase gives them the opportunity to express needs and concerns, and encourages ownership and support for the initiative.

Once management support is established, the next step is to articulate the vision, goals and expected results to individuals who will be participating in the learning program.

Turn company needs into their wants

While short-term goals behind a learning initiative may be obvious to participants, a link to overall business objectives and individual benefits can be clear as mud. Consequently, the question on everyone's mind will be, "What's in it for me?"

To answer, consider again the goals and priorities of the organization and the fact that everything is connected. For instance, individual tasks are connected to group objectives, which in turn are connected to strategic plans, organization outcomes, and corporate profits. Consequently, the individual's contribution to the company — good or poor — will have a direct impact on his or her career. (See Sidebar 2, "What's in it for me?" to the right.)

Help individuals to view corporate goals in the context of what they do, what it means to their job, and finally what it means to their department and coworkers on a daily basis. This enables companies to highlight the mutual benefits of participation in the learning initiative.

Clearly defined expectations

Best results are achieved if program goals and accountability for results are introduced early. Participants should be encouraged to establish goals and objectives before, during, and after training. If left until the very end, objectives tend to be more superficial and are rarely aligned to business goals.

Managers should discuss objectives with participants before an e-Learning program is launched in order to establish expectations and ownership of results. Managers should address:

- Key skills and knowledge to be gained.
- How the training will be applied.
- Job results that should improve as a result.
- Business objectives and goals the training will support.

Introducing clarification and follow-through procedures at the beginning of each learning experience is important to support goal planning and implementation. Defining expectations will help participants translate what they learn into steps that will improve performance. These goals become the foundation of the follow-through phase.

But let's start at the beginning with the elements that are conducive to successful learning outcomes.

Collaborative, blended environment

E-Learning and Web-based technologies are essential tools, but are not in themselves a strategy. Relying entirely on technology or any single element of the e-Learning equation will only set the initiative up for failure.

Organizations should avoid getting caught up in technology's bells and whistles without addressing the core issues of learner styles and needs, the impact of various delivery models on the learning process, and the new roles of instructor and student in the self-led learning and performance building process.

And while an emphasis exclusively on space-age content delivery will fail to yield results, traditional learning models alone will no longer thrive in organizations, either. There are two main reasons:

First, individual development today is about meeting the learner's needs for improved performance. This cannot be accomplished by following the traditional learning models of the past, or by simply throwing content on a Website. Targeted, on-demand learning and performance support must be engaged to align individual learning with specific job and business requirements, and to achieve specific performance outcomes.

Second, the younger, "gaming generation," was raised expecting immediate access, robust interaction that appeals to multiple senses, and a full spectrum of choices when it comes to learning, retrieving, and engaging content. For this generation, the Internet plays a central role in their desire for flexibility at home, at work, and at play. Being online and always connected is second nature to them, and they've developed the ability to multi-task better than any generation before. This will drive demand for richer, more dynamic interactivity from future learning and performance support models.

Teachers at universities are seeing firsthand the ways in which this generation is using the Internet to study, date, meet friends, and enhance life in general. For example, students are going online during class and finding Websites that supplement discussion, and they're more likely to do research on the Net than visit a library. It is now common practice for teachers to distribute assignments or class handouts online, while class-related chats and electronic bulletin boards provide a platform for group discussion and enhanced study outside the classroom.

It is the students that are driving the

SIDEBAR 2 *What's in it for me?*

Help individuals see the e-Learning initiative as a means by which to enhance their contribution to the organization, which in turn produces desirable, career-building benefits, such as:

1. **Visibility:** Connect the achievement of the learning program's goals to the employee's desire for recognition, reward, and advancement.
2. **Personal Development:** Appeal to individual interest in learning new skills, receiving greater responsibility, or improving performance to company objectives.
3. **Impact on Outcome:** Help individuals identify the critical skills and knowledge that drive positive company results by creating strong links between goal achievement and performance outcomes.
4. **Problem Solving:** Present the learning initiative as a solution to specific employee issues such as poor communication, complicated processes, or limited resources.

use of technology on campus, and as they enter the workforce, they're pushing technological advances in their organizations as well. Consequently, a growing number of companies have begun responding to the needs of the new learner. Greater percentages of corporate training budgets support alternative learning and performance support methods, such as intranet development and consulting services. This indicates a growing awareness that traditional training models are falling short. It also signals the opportunity to define and deliver effective blended learning models, to better address learning and performance needs in today's accelerated business environment.

The concept of blended learning grew out of the successes and failures of e-Learning. While some instruction is appropriate for delivery over the Web alone, the right combination of technical, human, and content elements can significantly increase learning and employee productivity. According to Thomson/NETg's Annual Job Impact Survey

(released in 2003), a structured curriculum of blended learning generated a 30 percent increase in accuracy of performance and a 41 percent increase in speed of performance over single-delivery options.

Blended learning elements

Blended learning can be defined as a learning solution that combines live e-Learning, self-paced learning, and face-to-face elements using a number of delivery media, technologies, events, and practices. Such a solution can be deployed effectively for targeted development in three key areas: knowledge and skills; workplace behavior; and individual or group competency.

Along with the appropriate mix of elements, timing and relevance are also important. The key to successful blended learning is combining the right elements at the right time to achieve the desired result. Online instruction, live classroom training, and quality content are foundational to a balanced learning initiative. In addition, learners require a

rich, interactive environment that supports multiple learning styles and encompasses human touch, expert guidance, opportunities to practice and reinforce learning, and resources for expanded study. The essential elements in this mix include live support and a virtual environment where learners can put to work the skills they have just learned.

Live mentor or instructor support

While a successful blended learning initiative requires a careful alignment of people, content, and technology, the human element is often missing in this equation. Essentially, e-Learning works best when there is a continual exchange between students, instructors, and the learning community, in order to make abstract or confusing concepts clear and to ensure learners don't feel isolated.

Learners succeed by taking content and reformulating it, giving it their own interpretation, applying it to real-world tasks, and sharing it with others. Interaction with and feedback from instructors and the learning community enables individuals to build understand-

e-Learning for e-Learning Professionals...

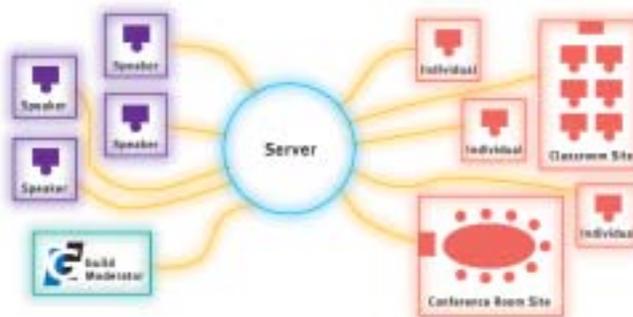
The eLearning Guild's **ONLINE FORUM**[™] **SERIES**

The eLearning Guild has created *The Guild Online Forum Series*, a new series of online events that will be held throughout 2005. On the 2nd Thursday of every month (except January) you can register to participate as an individual, or as a group, in a one-day "virtual conference" that includes four highly interactive seventy-five minute sessions designed to explore a specific topic.

Here's how the Online Forums work:

Individual or Site Registration:

Participate as an individual or you can pay a site fee, set up your meeting room, and have your e-Learning team participate in an Online Forum as a group!



Here's a brief description of the next Online Forum in the series...

FEBRUARY 10, 2005

Strategies and Techniques for Building Interactivity into e-Learning

In this Online Forum you will learn how to make it the "e" in your e-Learning stand for Engaging, Educational, Entertaining, Exciting, Effective, and Excellent. You'll see examples of various levels of interactivity and we'll explain the underlying designs. Examples will include both low-cost and high-end interactivity. Whether you are designing for asynchronous, synchronous or blended courses, you will learn techniques for engaging the learners.

Target Audience: e-Learning Instructional Designers, Developers, and others interested in enhancing interactivity in their e-Learning programs.

To learn more about each upcoming Online Forum and to register, go to:

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ing and retain key concepts. Collaboration tools such as chat, instant messaging, email, threaded discussions, and application sharing can help answer this need.

The most advanced interactive platforms for live mentoring offer access to collaborative learning and communication tools through a single entry point or interface, which can be integrated into an organization's LMS or intranet for seamless, on-demand access. This enables individuals to tap a subject matter expert for live help whenever needed to maintain learning momentum and avoid the frustration and isolation that can often lead to course abandonment.

Live mentoring can also provide desk-side assistance for just-in-time learning and performance building, reducing help desk and technical support costs for the organization.

Virtual environments

Experts say real learning takes place when individuals attempt to apply what they've learned. Consequently, the key to increasing the value of a learning initiative is to quickly and effectively parlay what is learned into action.

The best Web-based labs and virtual environments can reproduce a compa-

ny's infrastructure or work environment in a fail-safe setting, so individuals can build skills and confidence on live servers, operating systems and desktop applications without risk to the organization.

Web-based labs take individuals beyond simply clicking through content to hands-on experimentation enabling them to apply concepts and skills using the same technology and environments they'll encounter within their organization. Labs may also provide objectives and instant feedback to show individuals where they're making progress and to identify areas in need of reinforcement. Labs that correspond directly with course curriculum and vendor certification tracks such as the Microsoft MCSE can also prove helpful in assisting individuals as they prepare for certification.

Internal marketing

There are generally two ways to encourage individuals to participate in a learning initiative. If learning is not mandatory, the use of an internal marketing program will be critical to the initiative's success. (See Sidebar 3, "Internal promotion" at right.)

Internal marketing can be done in three key phases:

1. Launch: introduces employees and managers to the new initiative.
2. Awareness and Engagement: promotes program benefits and encourages utilization.
3. Sustainment: ensures utilization is maintained and increased.

An internal marketing program should have two main audiences: management and the end-user population. A marketing plan and timeline should be created to begin several weeks before launch and continue through the life of the initiative.

SIDEBAR 3 *Internal promotion*

A number of tools and events can be used effectively for internal promotion, including:

- Intranet
- E-mail and Voice Mail
- Posters
- Flyers/Handouts
- Newsletter
- Desktop References
- Special Events: Lunch & Learns, Contests, Open Houses
- Integration into Employee Development and Orientation Sessions
- Success Stories

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It is important to remember that a successful program launch is only the beginning. Interest and use will eventually fizzle if marketing efforts do not continue. Executing each of the above stages will ensure long-term success.

Keeping the program on track

Training is often viewed as a one-time event with course completion as the finish line. Without keeping an eye on successful implementation of newly gained knowledge and skills, the initiative will fail to bring forth desired training out-

comes.

Implementing a new work habit or using a new skill requires repetition and practice. According to some experts, without reinforcement 87% of new knowledge and skill is lost within the first 60 days after training. Therefore, active follow-through and accountability can significantly increase knowledge-to-application transfer to an individual's job-related duties and contribute directly to improved business results.

Best results are achieved in organizations that engage in proactive follow-up

in the weeks immediately following training. Without it, the rate of relapse into less productive performance can be significantly high. Key components for helping individuals keep performance goals top-of-mind include:

- **Periodic triggers:** An automated email or voice mail can remind individuals to assess progress toward learning objectives and performance goals.
- **Group support:** Individuals establish goals and declare them to peers or co-workers, provide updates on progress, share learning experiences, and obtain help from mentors or others.
- **Management ownership:** Managers periodically assess progress of direct reports and recognize when mentoring, reinforcement, or other intervention is required.
- **Mentoring or coaching:** Individuals receive expert input and guidance in order to make the most progress when applying new skills for performance improvement.

Do you have an interesting strategy or technique to share?

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Even if you have not been published before, we encourage you to submit a query if you have a great idea, technique, case study or practice to share with your peers in the e-Learning community. If your topic idea for an article is selected by the editors, you will be asked to submit a complete article on that topic. Don't worry if you have limited experience writing for publication. Our team of editors will work with you to polish your article and get it ready for publication in the **Journal**.

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- **A draft of the first paragraph**
- **A short outline of your main points**
- **One paragraph on your background or current position**
- **A working title**
- **Your contact information:** name, job title, organization, phone, email.

If the topic fits our editorial plan, Bill will contact you to schedule the manuscript deadline and the publication date, and to work out any other details.

Refer to www.eLearningGuild.com for Author Guidelines.

Conclusion

E-Learning can play an integral role in keeping organizations in pace with market dynamics. It begins with seeing e-Learning's promise beyond the delivery of content, and engaging it strategically to develop the knowledge, skills and competencies required to succeed. With the right mix of planning, promotion, technology, learning environment, and people, e-Learning can help companies achieve performance at the speed of business! 

Author Contact

Wayne Goldstein is an industry veteran and CEO of Global Mentoring Solutions, a leading provider of Web-based learning support solutions — including Real-Time Mentoring™ and Real-Time Labs™.

Contact Wayne through www.globalmentoring.com

Additional information on the topics covered in this article is also listed in the Guild Resource Directory.

Maureen Miller has over 20 years experience in teaching, both face-to-face and at a distance. She earned two of her degrees at a distance, one by correspondence and one via the Internet, and was one of the pioneers to develop the World Bank's global distance learning strategy. Maureen currently assists organizations in planning, designing and delivering courses and workshops using a variety of technology tools. She also practices and teaches Tai Chi and uses its philosophy, on a daily basis, to turn the constraints she faces into benefits. Contact Maureen by email at milleratlarge@mac.com.

Turning Constraints into Benefits

Learning from the Tao

Constraints are all around us. In the e-Learning world, constraints are often propagated by technical glitches and scheduled system maintenance. Sometimes they are proliferated by a course's popularity or shaped by a know-it-all expert — or student. Often they are handed to us in the form of a project with limited time and budget. Constraints restrict our freedom to act, and, too often, they threaten our ability to just get the job done.

But what if we could take each constraint and turn it into a positive benefit? It is possible — it just requires a bit of foresight, knowledge, and practice. The way I have learned to turn constraints into benefits is to follow Tai Chi movements.

Tai Chi is an ancient Chinese exercise that dates back to the fifth century. It consists of a philosophy that is built on Taoism which essentially urges followers not to resist the natural ebb and flow of life. After all, nature will always win, so why waste energy? Thus, instead of resisting, the Tai Chi practitioner takes time to breathe, to be present in the moment, to sense his environment and become more aware of what is happening around him. In this reflective stance, the practitioner then begins to feel for weak spots or openings in order to redirect his energy towards them.

You too can use this Tai Chi philosophy to eliminate the frustrations associated with constraints and to begin to reap benefits. Just follow these simple steps.

1. Breathe

First, you must have a clear mind. To reach that state, consider the Taoist saying: *If you're not quite sure what to do, don't do anything yet. More will be revealed.* When faced with the unexpected, our first reaction is too often an overreaction — an angry shout, a slamming of the fist or placing blame. A better reaction is no immediate outward action. Don't do anything yet. Instead, just breathe. Why is this a better response? Because breathing — taking long deep, even breaths in and out — calms the heart, lets the blood flow and clears the mind. It also gives you a moment or two to really take stock of what is happening. And it gives time to those behind the scenes to be thinking and working to fix things — uninterrupted by unwanted or unproductive outbursts

2. Be present

Now focus your whole mind and being on the present. Concentrate on what is happening right now, in this moment. If you are working at a distance, focus also on what might be happening at your distant sites. The key is to open your mind, as well as eyes, to see your surroundings clearly.

3. Sense

Gather in information. Listen carefully to what those around you are telling you. Calmly ask questions and look directly at those who you are relying upon for information. Listen to them carefully. Making them aware that you are fully present and that their input is honestly being taken in and considered. Use as many of your senses as possible. Be aware of body language as well as tone of voice.

4. Yield and overcome

Let go of your own expectations. Feel for the weaknesses and openings — the other ways of moving, of doing things. The magic is that while you are yielding to your environment, more and more ideas will begin to flow, both from within yourself and from those around you.

5. Redirect

Now prioritize the constraint, as well as the constraints within the constraint. Place each in its proper slot and determine the tasks that must be accomplished to fix the problem, minimize its effect and benefit from it. Take advantage of other aspects of the environment that are already there, and take advantage of colleagues who can assist you. Put on your creative cap. Begin to take action.

Summary

Don't look at constraints as restrictions. Instead look at them as opportunities to follow a different track, try a new theory, create or form new partnerships, or discover new media or methods. By addressing constraints with a calm mind, focusing on the present, sensing who and what is being affected, listening to those who can help you and finding creative solutions, you will earn a reputation as a problem solver. Also you will begin to gain peace of mind, better health and better balance in dealing with the numerous constraints life will continually throw your way.



The eLearning Guild™ is a global Community of Practice

Through this member-driven community of designers, developers, and managers of e-Learning, the Guild provides high-quality learning opportunities, networking services, resources, and publications.

Guild members represent a diverse group of instructional designers, content developers, web developers, project managers, contractors, consultants, managers and directors of training and learning services – all of whom share a common interest in e-Learning design, development, and management. Members work for organizations in the corporate, government, academic, and K-12 sectors. They also are employees of e-Learning product and service providers, consultants, students, and self-employed professionals.

The more than 14,600 members of this growing, worldwide community look to the Guild for timely, relevant, and objective information about e-Learning to increase their knowledge, improve their professional skills, and expand their personal networks.

Resource Directory

The Guild hosts the e-Learning industry's most comprehensive resource management system that includes more than 4,500 (and growing) e-Learning related resources in a searchable database. Guild Members can post resources and can update them at any time.

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The eLearning Guild conducts continuous polls and more than a dozen surveys and studies each year – including an annual salary survey. Guild Members have unlimited access to all data and analyses.

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The Guild's unique and focused symposia drill into the most critical issues for e-Learning designers, developers, and managers. These are

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The eLearning Producer Conference, held in the fall each year, offers comprehensive and in-depth content for all e-Learning professionals in a collegial environment conducive to learning and sharing.

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If you attend a Guild event, you have immediate access to all event proceedings. If you do not attend, as a Guild Member you still have access to the proceedings 90 days after an event ends.

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In order to maintain a vital community and provide relevant information, The eLearning Guild seeks the active involvement of all Guild Members and Guild Associates. Consider these ways to engage:

Speak at Guild Events: Members and Associates are encouraged to submit presentation proposals for any and all Guild events.

Write for the Journal: *The eLearning Developers' Journal* articles are written by industry leaders and practitioners just like you who are working in this field every day.

Join the Program Advisory Committee: This committee works to craft the program content of all events produced by the Guild.

Join the Research Advisory Committee: This committee works to identify the topics for Guild surveys and studies, and also develops the survey instruments.

The eLearning Guild organizes a variety of industry events focused on participant learning:

