

Report
Abstract

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360° REPORTSM

June 2007

SYNCHRONOUS LEARNING SYSTEMS

**Benchmarks, Best Practices,
and Real-Time Analysis about
Real-Time Learning**

*Online Analytics Tools
provided by ...*



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Visual analytics component developed using Tableau from Tableau Software.

Profile database and back-end survey system developed by Cyclone Interactive.

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The eLearning Guild Research Pledge

Our goal is to provide the best research based on the best data. Indeed, with well over 25,000 e-Learning professionals – designers, developers, managers, and executives who are passionate about the art and science of e-Learning – the Guild has an unmatched and enormously rich and varied pool from which to gather data.

But let us be very clear that this data represents one thing and one thing only: the preferences, opinions, loves, loathings, trials, and triumphs of eLearning Guild members. Does the information represent the e-Learning industry as a whole? Probably, but we cannot – and will not – make that claim.

And anyone else publishing articles or research that makes that claim – and makes it using a much smaller data set than we would ever consider using – is presumptuous at best.

Here are the five articles of practice that drive eLearning Guild Research:

1. **Live, interactive, always-up-to-date.** In addition to providing members with truly useful visual analytics tools, the underlying data is *always* up to date and displayed in real time.
2. **Number of respondents.** Our research reflects the opinions of *thousands* of e-Learning professionals. The Guild has more, and better, data than is available any place else. *Indeed, we will never publish results from a survey unless we have received at least 750 fully-vetted responses.*
3. **No reliance on outside sources that will bias our reports.** With thousands of members updating their profiles and completing surveys, the Guild does not need to rely on outside sources for contacts to complete surveys.
4. **Funding.** The eLearning Guild funds its own research. We do not accept any form of sponsorship from vendors and/or suppliers for public research activities.
5. **Guaranteed Fresh.** Every 90 days we remind members to update their profile and survey information. If a member goes a year without updating information, we filter that information out of our live reports.

For the Guild's 360° Reports we carefully review respondents' data for accuracy and consistency. If we detect an anomaly, we contact that respondent and ask that he/she clarify his/her responses. If any issue cannot be resolved, we discard the data from this respondent and it is not included in our report.

The Guild is truly an amazing organization and I feel privileged to be a part of it. My goal is to leverage the depth, breadth, and spirit of the Guild's members to produce the gold standard in e-Learning research.

Sincerely,



Steven S. Wexler
Director of Research and Emerging Technologies

Abstract

Synchronous learning is pervasive and its penetration within certain industries has grown significantly. This report underscores the significant variations among the available synchronous learning tools, highlighting differences in features, ease-of-use, Guild member satisfaction, and costs. As varied are the tools are the techniques for deploying these tools and our report unveils differences in practice among organizations that report a strong ROI and those that report a poor ROI. The report also examines future directions in synchronous learning and in particular the integration of synchronous learning with 3D virtual social worlds.

As of this writing, 4,020 Guild members have told us which Synchronous Learning Systems they use, 1,679 have rated these systems, and 827 have completed the comprehensive survey on synchronous e-Learning.

Highlights of our findings include:

- Close to 35% of members report that they do not yet use a Synchronous Learning System (organization of all sizes).
- 28.89% of members working in organizations with more than 10,000 employees report that they do not use a Synchronous Learning System.
- 42% of Guild members plan to expand their use of Synchronous Learning Systems and 17% plan to purchase/license a synchronous learning system.
- The tools are NOT commodities – there is a huge difference in feature usage, ease of use, satisfaction, and cost per learner.
- Members that offer synchronous learning through an LMS report better ROI and a greater level of satisfaction.
- The use of synchronous learning in the financial, insurance, and healthcare industries is increasing at a large rate.
- The vast majority of Guild members report that synchronous learning systems are essential to their organization and, that when set up properly, rival the best instructor-led training.

- The average cost per learner to purchase and implement a synchronous learning system (first year of use) is \$42.97 (low-range of spending) and \$99.36 (high range of spending).

How the Report is Organized

Market Share, Satisfaction Results, and Guild Members-Choice Awards

In this section we offer a “snap shot” of results from the Guild’s market share and tools satisfaction Direct Data Access portfolios, as of June 5, 2007.

Survey Results

In this section we review and analyze responses we received to the Guild’s Synchronous Learning Systems survey.

An “On-Ramp” to Synchronous Learning Systems

Karen Hyder, Online Events Moderator and Speaker coach for The eLearning Guild, leverages her formidable expertise to help you get up to speed quickly with what it takes to deliver engaging synchronous learning sessions. If you are new to synchronous learning – or if you’re experienced but would like to do it better – we strongly encourage you to read this essay.

Escaping Flatland: The Emergence of 3D Synchronous Learning

Karl M. Kapp, professor of Instructional Technology at Bloomsburg University in Bloomsburg, PA, and Tony O’Driscoll, Performance Architecture Analysis and Design for IBM Sales Learning, immerse you into the next generation of synchronous learning systems. This is both a “must read” and a “great read” as Karl and Tony manage to bring the excitement of synchronous learning in a 3D virtual social world to life on the 2D written page.

Case Study — Learning science through synchronous learning – the “Space Safari” project

Val Brooks, Deputy Director at Stockton City Learning Centre in the UK, explains how she and her colleagues use synchronous learning as part of a blended approach to connect primary and middle school students with working scientists throughout the world to bring science education to life.

Case Study – Field-Based Employee Training in a Virtual World

Ron Burns, Co-founder of Proton Media, explains how a major pharmaceutical company uses a 3D synchronous learning environment to dramatically decrease the time required for field-based employees to learn to establish business relationships and sell new drug offerings.

Case Study – Quality Assurance in the Virtual Classroom

David Ward, e-Learning Manager for the American Association of Critical-Care Nurses (AACN), chronicles his experience in establishing a reliable, fault-tolerant synchronous learning infrastructure for a leading for-profit learning provider.

Case Study – Using a Multi-User Virtual Environment (MUVE) for Education

In this “encore presentation” that first appeared in the Guild’s 360° Report on Immersive Learning Simulations, Sarah Robbins, Ph.D. candidate in Rhetoric and Composition at Ball State University in Muncie, Indiana, shows how to effectively combine simulations and synchronous learning techniques to enliven an undergraduate English class presented in a 3D virtual world.

Resources

This section contains links to Web sites, books, and hardware devices that will help you navigate the synchronous learning world.



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Market Share, Satisfaction Results, and Guild Members-Choice Awards

Overview

In addition to the survey data conducted for this report, The eLearning Guild gathers other information from its members, including **member profile data**.

All Guild members are directly involved in the management, design, development, and delivery of e-Learning in corporate, government, academic, and non-profit organizations.

For this community to succeed – and for members to get as much as possible from the Guild – we ask that every member submit a complete and accurate profile.

At the time of this writing, more than 9,750 members have up-dated their profiles. Members are updating their profiles at a rate of approximately 1,000 per month. In addition, more than 6,000 members have indicated which tools, products, and services they use, and have rated these tools, products, and services.

Market share and Tools satisfaction reports for all categories of tools, products, and services are available to all paying Guild members (see <http://www.elearningguild.com/pbuild/linkbuilder.cfm?selection=fol.28>). We have included a subset of these reports, both here and online, that summarizes market share and satisfaction for Synchronous Learning Systems (SLS).

At the time of this writing, more than 9,750 members have up-dated their profiles. Members are updating their profiles at a rate of approximately 1,000 per month.



Guild Members-Choice Platinum and Gold Award Winners

The eLearning Guild Research is very pleased to present tool and product vendors with two types of awards to recognize these vendors' contributions to the e-Learning industry.

Guild Research Market Share Award

Guild Research presents one Platinum award and two Gold awards to the products within a particular category that are used by the most Guild members, recognizing these vendors for developing tools and products that make Guild members' lives easier.

Guild Research Satisfaction Award

Guild Research presents one Platinum award and two Gold awards to the products within a particular category that have received the highest overall satisfaction rating from Guild members.

How we determine overall satisfaction rating

We ask members to rate products on a scale from 1 to 10 in four categories. The overall score is determined based on the following weightings:

- Would you use this vendor again? – 50%
- Vendor responsiveness (includes technical support) – 15%
- Learning / Implementation curve – 15%
- Cost / benefit – 20%



Notes on the Tools and Products in this Section

- Filter: Industry
- Aerospace/Defense
 - Agriculture/Mining
 - Automotive/Transportation
 - Computer Manufacturing (hardware, s...
 - Construction/Architecture/Engineering
 - Consulting (Computer)
 - Consulting/Business Services (Non-co...
 - Education (K-12)
 - Education (University/College)
 - E-Learning Tool/Service Provider
 - Energy/Utilities
 - Financial/Banking/Accounting
 - Government (Federal including Military)
 - Government (Local)
 - Government (State)
 - Healthcare
 - Insurance
 - Manufacturing (non-computer)
 - Media/Marketing/Advertising/Entertain...
 - Non-Profit/Trade Association
 - Pharmaceuticals/Biotech
 - Real Estate
 - Retail/Wholesale/Distribution (Computer)
 - Retail/Wholesale/Distribution (Non-co...
 - Telecommunications
 - Travel/Hospitality

The market share and satisfaction results represent how Guild members use, or have used, these products as of June 5, 2007. As of this date, 3,841 members have told us which Synchronous Learning Systems they use, and 1,604 members have rated these tools.

The list of tools that they use, and those which are well-rated, will always be changing. And what is popular within one industry, or for a large organization, may not be popular for another industry, or for a small organization.

Important: We strongly encourage you to take advantage of the online interactive analytics and survey data so you can focus on the market share and satisfaction leaders for your industry and your company size. You can further filter by job level, primary job responsibility, and number of learners impacted.



SLS Market Share – Corporate

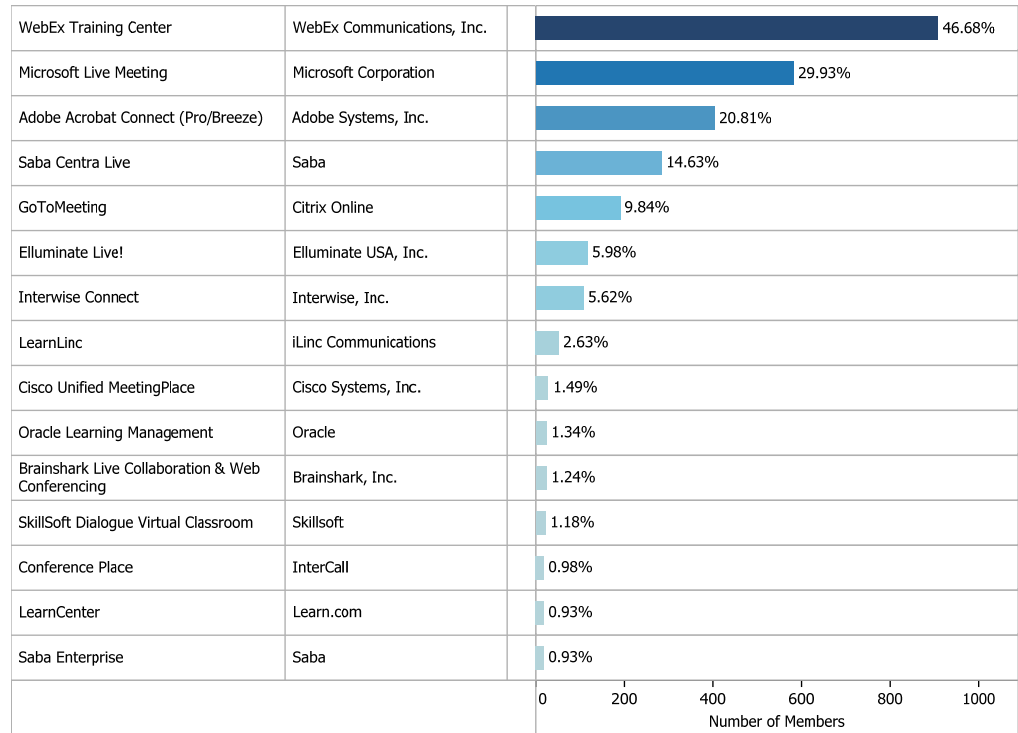


Figure 33 – SLS Tool market share results for corporations as of June 5, 2007 (based on minimum of 20 responses).



Guild Research 2007 Platinum Award – Market Share: Corporate Synchronous Learning Systems

WebEx Training Center (WebEx Communications, Inc.)



Guild Research 2007 Gold Awards – Market Share: Corporate Synchronous Learning Systems

Microsoft Live Meeting (Microsoft Corporation)

Adobe Acrobat Connect (Adobe Systems, Inc.)



SLS Market Share – Education and Government

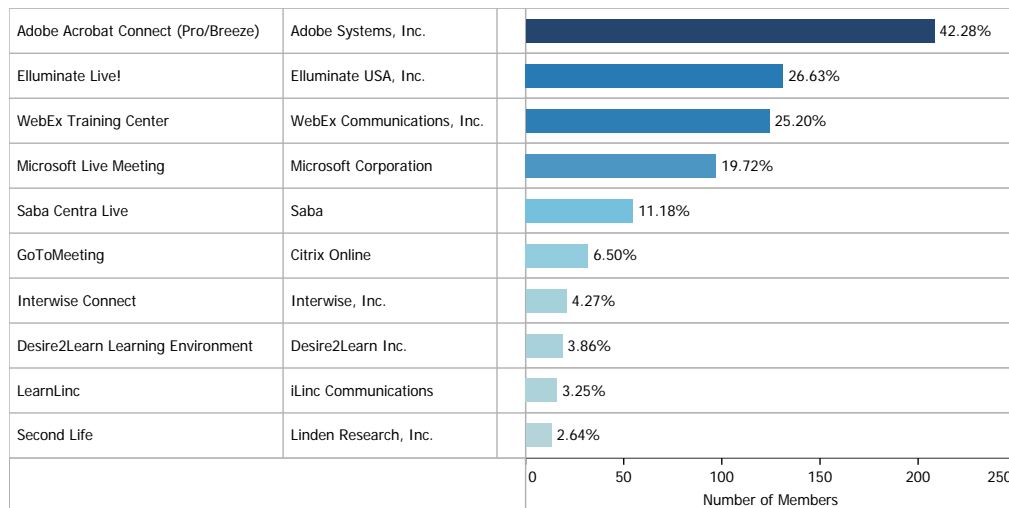


Figure 34 – SLS Tool market share results as of June 5, 2007, for education and government institutions (based on minimum of 15 responses).



Guild Research 2007 Platinum Award – Market Share: Education and Government Synchronous Learning Systems

Adobe Acrobat Connect (Adobe Systems, Inc.)



Guild Research 2007 Gold Awards – Market Share: Education and Government Synchronous Learning Systems

Elluminate Live! (Elluminate USA, Inc.)

WebEx Training Center (WebEx Communications, Inc.)



SLS Satisfaction – Corporate

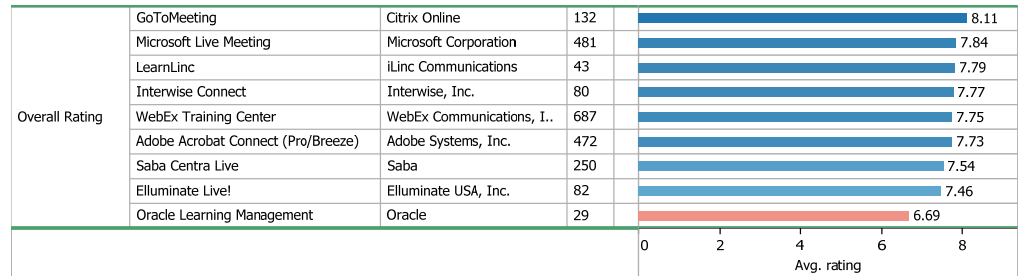


Figure 35 – SLS Tool overall satisfaction results for corporations as of June 5, 2007 (based on minimum of 20 responses).



Guild Research 2007 Platinum Award – Satisfaction: Corporate Synchronous Learning Systems

GoToMeeting (Citrix Online)



Guild Research 2007 Gold Awards – Satisfaction: Corporate Synchronous Learning Systems

Microsoft Live Meeting (Microsoft Corporation)

LearnLinc (iLinc Communications)



SLS Satisfaction – Education and Government



Figure 36 – SLS satisfaction results as of June 5, 2007, for educational and government institutions (based on minimum of 15 members responses).



Guild Research 2007 Platinum Award – Satisfaction: Education and Government Synchronous Learning Systems

Elluminate Live! (Elluminate USA, Inc.)



Guild Research 2007 Gold Awards – Satisfaction: Education and Government Synchronous Learning Systems

Microsoft Live Meeting (Microsoft Corporation)

WebEx Training Center (WebEx Communications, Inc.)