E-Learning Enchilada To Go

From portals to vortals. Startups to one-stops. ASPs to ESPs (application service providers to education service providers). The Venn-diagram bullseye of e-learning providers, at least this year, includes companies that claim to offer the whole enchilada of training courses, custom services, and tech tools. Dare I say it? An end-to-end, we're-your-guys, don't-need-anyone-else total solution. And if all press releases that cross my desk are right, that's 95 percent of e-learning players.

Why all the hubbub? I'll spare you the John Chambers quote and gently remind you that elements are converging to open the floodgates of e-learning. We're talking broadband and interoperability standards, for starters.

One thing's for sure: It's a to-go industry that's ready for pickup. Pass the hot sauce.

The Big Three

According to online investment bank W.R. Hambrecht + Company, the e-learning marketplace can be broken down into numerous segments, but the main three, at least for now, are content, technology, and services.

Content is the largest segment with a 66 percent market share, and it's growing at an annual rate of 74 percent, according to IDC estimates. The technology segment is expected to have an annual growth rate of 80 percent through 2003. However, services is the fastest growing segment, forging ahead at a whopping 111 percent growth clip.

According to a Hambrecht report, the global e-learning industry comprises about 5,000 players offering a multitude of services. And no competitor in the market accounts for more than 5 percent share. Yet. Consolidation is underway, so that could change by the time these words go to print.

Here's a look at the major segments and how some of the main players fit in, according to Hambrecht analyst Cornelia Weggen (note: some companies overlap sectors).

Content. Consists of publishers, licensers, and traditional classroom training companies. Examples: Element K, Execu-Train, Learn2.com, Learning Tree International, and SkillSoft.

Services. Includes learning portals, communities, online certification and testing services, learning service providers, and online tutoring and mentoring services. Examples: Click2learn.com, Headlight.com, iGeneration, Powered, and THINQ.

Technology. Made up of software and hardware suppliers that create, deliver, and manage such e-learning technology as authoring and publishing tools, learning management systems, collaboration tools, and specialized e-learning hardware. Examples: Centra Software, Lotus LearningSpace, Pathlore, Saba Software, and TrainingServer.

So who will be the winners? According to Weggen, "First movers that manage to build a brand name quickly will likely be among the market leaders. To succeed, it will be key to combine a quality product with value-added services and a national presence. To secure sizable market share, competitors need to play on all three major fronts—content, technology, and services—and to deliver an integrated, complete e-learning solution. Such a strategy implies entering strong partnerships or acquiring complementary content, technology, and know-how."

Right now, the companies that come closest to the "whole enchilada," according to Weggen, are DigitalThink, KnowledgePlanet, Mentergy, Ninth House Network, Pensare, and SmartForce.

Would You Like Training With That?

You can now order training along with your online purchases at Staples.com. The office-supply giant is partnering with e-learning vendor Personable.com to provide more than 100 online courses—priced from $66 to $146 per learner—and covering such topics as Web design, marketing, JavaScript, and technology certification.

"Companies looking at high-volume, low-profit sales are looking at [e-learning] like a stapler or reams of paper; it's just one item in their inventory," says GartnerGroup analyst Clark Aldrich.

Next to enter the office-supply e-learning arena: OfficeMax, which will partner with Arthur Andersen's Virtual Learning Network.

Masters of Their Domains

Think the Internet is just for techies? Think again.

Overall, nontechnical professionals are scooping up domain names faster than Webheads, according to Network Solutions. Following is its ranking of top first-time domain-name buyers, by occupation:
1. photographers
2. attorneys
3. real-estate agents
4. church officers and clergy
5. insurance agents
6. Internet service providers
7. restauranteurs
8. physicians and surgeons
9. software professionals
10. accountants.

Just consider the e-learning vortal possibilities.

@Work *covers Internet trends, news, and tips. Send items of interest to atwork@astd.org.*

Monthly Tip

Looking for online recipes for enchiladas? You can access your favorite search site, type *enchilada* in the query box, and receive as many as 22,800 links—probably not what you had in mind. Here's how to search smarter.

Type exactly what you're seeking—not one keyword—using query rules (Boolean operators, quotation marks, and/or plus-minus symbols). For example, searching on *enchilada AND recipes* at Hotbot.com pares search results down to about 44, while *+enchilada +recipes +chicken +"Julia Child"* returns a manageable 17 URLs at AltaVista.com.

Purple People Seaters

Ten Internet taxi cabs hit the streets of New York in September.

Web portal Yahoo! teamed up with Palm, Medallion Financial Corporation, and Team Systems Corporation, for a six-month promotional program. There's no extra charge to ride in the cabs, which have the New York City Taxi and Limousine Commission's blessings.

The taxis' black upholstered seats have been replaced with what's described as "eye-popping purple." The cabs also sport purple Yahoo! signs on the sides and top. A small pouch in the back of the driver's seat holds a secured Palm VII computer, which riders can use to look up weather, sports reports, news, and stock reports, according to Linda Bennett, brand manager for Yahoo!

"The Internet used to be just for people at their desktops, then their laptops. But this program is really about getting the Internet where you need it most, on the road, on the go," says Bennett in announcing the specially outfitted cabs. It's not the first time taxi riders have been wired for the Web. A similar program was tested in San Francisco last year using laptops.

Can c-learning (cab-learning, that is) be far behind?

Sizzlin' Sites for Small Business

❑ **AllBusiness.com.** This site offers a buyer-seller marketplace, business startup kit, free business forms, and links to other useful services. Go to www.allbusiness.com.

❑ **Bigstep.com.** Here's a site that helps you create and manage an e-commerce Website, market your business online, sell products, promote events, and send email newsletters. Many features are free. It's at www.bigstep.com.

❑ **SBA Roadmap to Success.** This business plan model from the Small Business Administration can be used as a tutorial or self-paced activity. Go to www.sba.gov/starting/indexbusplans.html.

❑ **Smart Online.com.** This dot.com provides small companies software and other tools to help start, manage, and grow a business. Basic features are free. Find it at www.smartonline.com.

The E List

What questions should you ask to help determine the quality of e-learning courses? These, according to Drake Beam Morin's *HR Outlook:*

❑ **Learning objectives linked to business goals.** Does the content describe concrete learning objectives that are in sync with current business goals?

❑ **Solid instructional design.** Does the software adhere to modern adult-learning techniques and feature a self-directed, learn-by-doing design?

❑ **Appropriate use of media**. Is the program merely a reproduction of a workshop manual or binder?

❑ **Engaging and interactive methodologies.** Does the program involve the participant in realistic situations through a variety of interactive media?

❑ **Realistic examples and situations.** Does it offer direct links between learning and real life?

❑ **Friendly navigation.** Is the program intuitive? Can users quit the program anytime and return later to the same spot?

❑ **Skill application assessment.** Can it pinpoint how well learners will be able to apply new skills to real-life situations?

❑ **Tracking capabilities.** Can it compile critical information for analysis by learner, department, and organization?

❑ **Multiple deployment options.** Does it enable a variety of deployment options, such as CD-ROM, Internet, and intranet?