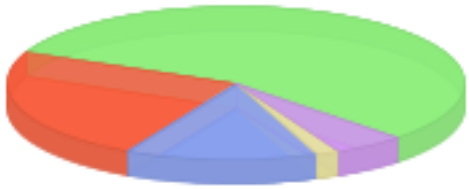
2009 Fall Conference Pulse of the Industry Final (59 out of 71)

Which of the following best describes your company's business?

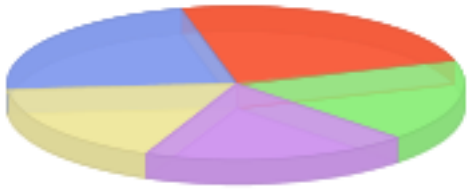


1 - Software	55.93% (33)	2 - Software and Hardware	23.73% (14)
3 - Software as a Service	13.56% (8)	4 - Hardware	1.69% (1)
5 - Other	5.08% (3)		

Mean: 1.76

Response: 59

What was your company's annual revenue in 2009, or most recent fiscal year?



1 - $100M or less	17.24% (10)	2 - Between $101M and $500M	24.14% (14)
3 - Between $501M and $1B	22.41% (13)	4 - More than $1B and less than $3B	17.24% (10)
5 - $3B or more	18.97% (11)		

Mean: 2.97

Response: 58

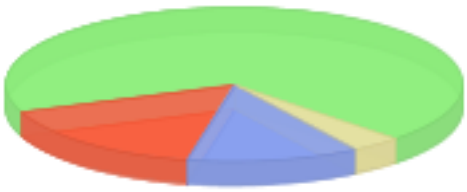
How many full-time employees does your company have?

1 - Less than 100	6.78% (4)	2 - 101 to 1,000	22.03% (13)
3 - 1,001 to 5,000	40.68% (24)	4 - 5,001 to 10,000	13.56% (8)
5 - 10,001 to 50,000	8.47% (5)	6 - More than 50,000	8.47% (5)

Mean: 3.2

Response: 59

Which of the following best describes your training organization's primary business model?



1 - Profit Center (expectation is to make a profit - may have a margin target to achieve)	68.42% (39)	2 - Cost Recovery (expectation is to sell enough training to at least break even on expenses)	15.79% (9)
3 - Cost Center (expectation is to provide non-education revenue benefits - for example better trained employees and partners)	12.28% (7)	4 - Other	3.51% (2)

Mean: 1.51

Response: 57

What were your training organization’s annual revenues in 2009, or most recent fiscal year?

1 - Zero (cost center)	9.09% (5)	2 - Less than $500K	12.73% (7)
3 - $500K but less than $1M	7.27% (4)	4 - $1M but less than $3M	7.27% (4)
5 - $3M but less than $5M	14.55% (8)	6 - $5M but less than $10M	14.55% (8)
7 - $10M but less than $50M	23.64% (13)	8 - $50M but less than $100M	7.27% (4)
9 - $100M or more	3.64% (2)		

Mean: 5.02

Response: 55

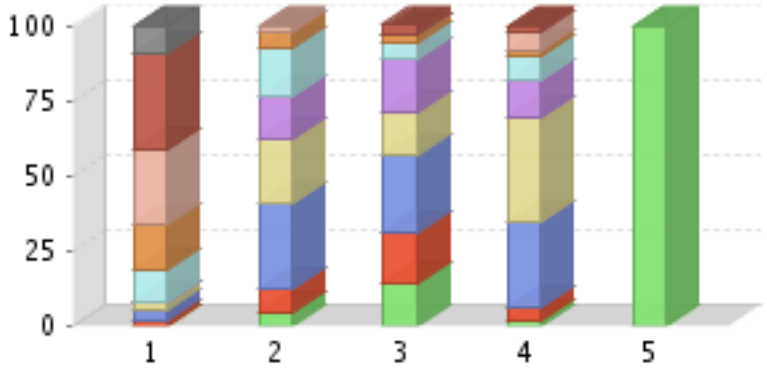
What was your training organization’s headcount in 2009, or most recent fiscal year?

1 - Less than 10	26.79% (15)	2 - 11-20	7.14% (4)
3 - 21-50	33.93% (19)	4 - 51-100	19.64% (11)
5 - 101-500	7.14% (4)	6 - More than 500	5.36% (3)

Mean: 2.89

Response: 56

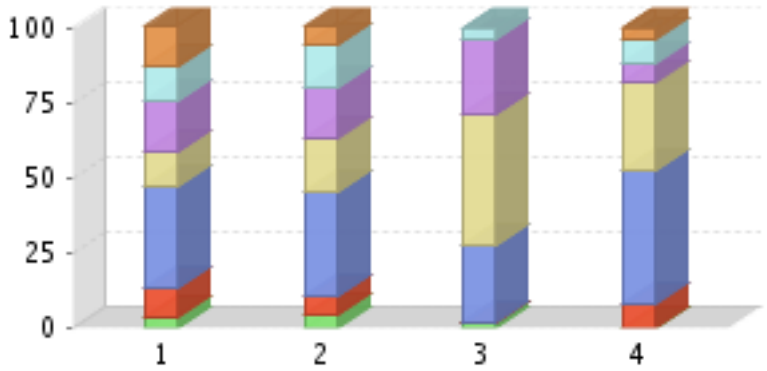
What percentage of students trained by your organization are the following:



		0%	1-2%	3-5%	6-10%	11-20%	21-40%	41-60%	61-80%	81-99%	100%	Mean
1	Customers	0% (0)	1.89% (1)	3.77% (2)	1.89% (1)	0% (0)	11.32% (6)	15.09% (8)	24.53% (13)	32.08% (17)	9.43% (5)	7.75
2	Business Partners	4.76% (2)	7.14% (3)	28.57% (12)	21.43% (9)	14.29% (6)	16.67% (7)	4.76% (2)	2.38% (1)	0% (0)	0% (0)	4.14
3	Resellers	14.29% (5)	17.14% (6)	25.71% (9)	14.29% (5)	17.14% (6)	5.71% (2)	2.86% (1)	0% (0)	2.86% (1)	0% (0)	3.49
4	Employees	2.04% (1)	4.08% (2)	28.57% (14)	34.69% (17)	12.24% (6)	8.16% (4)	2.04% (1)	6.12% (3)	2.04% (1)	0% (0)	4.27
5	Other	100% (1)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	0% (0)	1

Response: 55

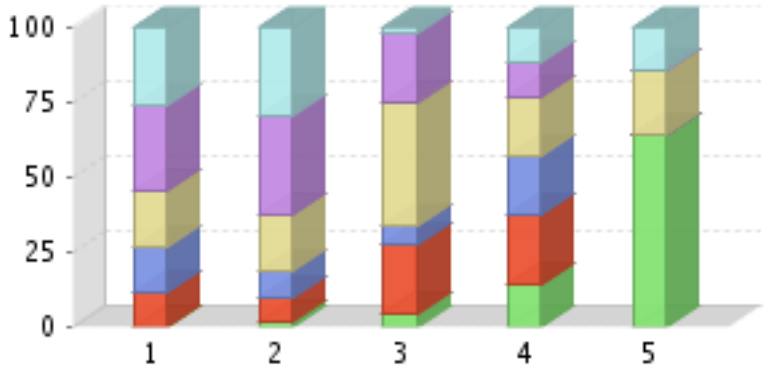
What percentage of change has your training organization seen from 2008 into 2009 in the following measures?



		<-40%	-40% to -20%	-20% to 0%	0% (flat)	0% to +10%	+10% to +20%	>+20%	Mean
1	Students trained	3.77% (2)	9.43% (5)	33.96% (18)	11.32% (6)	16.98% (9)	11.32% (6)	13.21% (7)	4.15
2	Revenue	4.08% (2)	6.12% (3)	34.69% (17)	18.37% (9)	16.33% (8)	14.29% (7)	6.12% (3)	4.04
3	Margin	2.08% (1)	0% (0)	25% (12)	43.75% (21)	25% (12)	4.17% (2)	0% (0)	4.02
4	Headcount	0% (0)	8% (4)	44% (22)	30% (15)	6% (3)	8% (4)	4% (2)	3.74

Response: 53

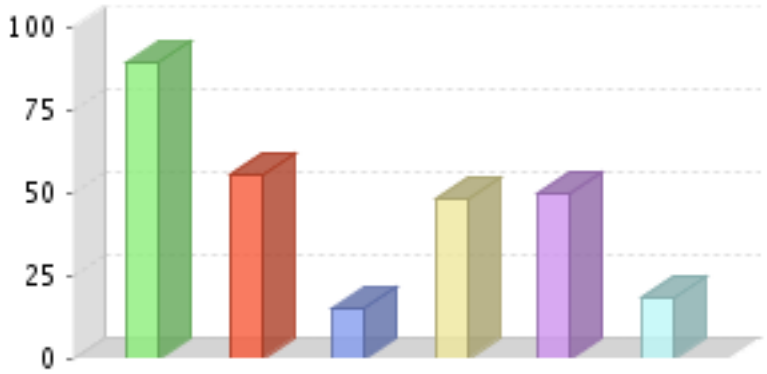
Please assess the following potential issues in the range 0 for no issue, 1 for minor issue, up to 5 for severe issue.



		0 = no issue	1 = minor issue	2	3	4	5 = serious issue	Mean
1	Customer/Partner has no/limited training budget	0% (0)	11.32% (6)	15.09% (8)	18.87% (10)	28.3% (15)	26.42% (14)	4.43
2	Travel time/costs	1.85% (1)	7.41% (4)	9.26% (5)	18.52% (10)	33.33% (18)	29.63% (16)	4.63
3	No time for training	4.17% (2)	22.92% (11)	6.25% (3)	41.67% (20)	22.92% (11)	2.08% (1)	3.62
4	Development/delivery resource	13.73% (7)	23.53% (12)	19.61% (10)	19.61% (10)	11.76% (6)	11.76% (6)	3.27
5	Other	64.29% (9)	0% (0)	0% (0)	21.43% (3)	0% (0)	14.29% (2)	2.36

Response: 54

Which of the following actions have you taken over the last 9-12 months to improve the situation?



1 - More e-Learning	88.89% (48)	2 - More onsites/customized events	55.56% (30)
3 - Training funded via products	14.81% (8)	4 - Development/delivery cost reduction	48.15% (26)
5 - More marketing/sales activity	50% (27)	6 - Other	18.52% (10)

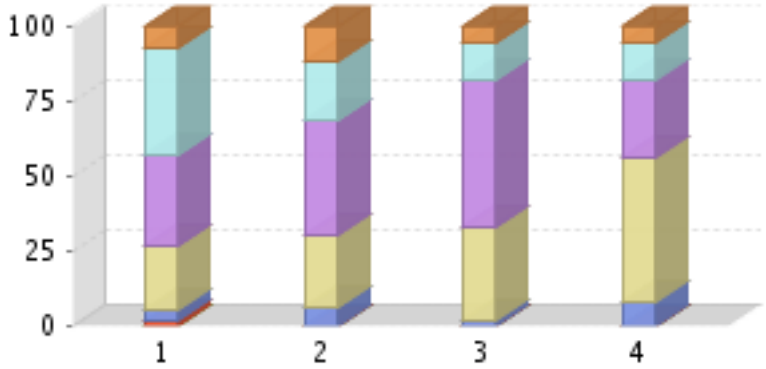
Response: 54

What have been your most successful solutions in 2009?

1	Replacing much of the in-class public schedule with Live Virtual classes. Replacing nearly all paper kits with eKits.
2	Self paced and Virtual
3	Virtual instructor led training offering and more training added to product deals
4	Have the Partner Marketing team fund training classes dedicated to partners at no charge to partners. The Partner Marketing team pays the training team so that we can still meet our revenue goal. Classes fill up within three days when partners do not have to pay for class. This is a win win for everyone. Only the top global partners are giving this option once or twice a year. Offering recorded classes with lab exerices and instructor support
5	Increase in virtual classroom delivery
6	a significant shift to virtual delivery of public classes.
7	providing virtual classes for those that customers have issue in T&E over, providing pre-packaged training solutions for sales to be able to attach to deals easier
8	* Distance Training (Hands on synchronous training - full day classes) * Offering enterprise license to Online Self-Paced Offering
9	Creating better efficiencies in our training --> altering content to fit/flow better in a given timeframe.

10	VILT Program Stakeholder Training Council Travel cost reduction 50% Trained 2.5 times more students on 2009 than in 2008
11	Adding focused Business Development headcount so that when the sales team drops training from their deals we can follow up on our own. Implementing solid training credit program with bulk discounts (the program prior to my joining did not provide volume discounts so I relaunched with discounts). Targeting beyond the individual learner and getting to the corporate buyer.
12	Added a rapid eLearning tool for internal technical training
13	Remote hands-on courses Portals to access electronic classrooms and eLearning
14	training funded via license sales small onsite initiative
15	More Virtual Training
16	Reducing costs for the customer, and overall reduction in our costs to maintain margin. In particular, Virtual Classroom has increased significantly.
17	More e-learning and licensing of virtual classroom software.
18	We've shed a lot long-term cost by opening up our own training facilities. This gives us more flexibility in how and when we offer our public courses. Onsites are still relatively popular. We are also launching a new training video service (for profit) in Q4 which I'm sure will be well-received.
19	More OnDemand development and sales for training.
20	Adding an up sell initiative within the Education Coordinator group to fill classes. Custom elearning development practice to drive more flexible solutions across customers.
21	Updating on-line help to complement the training offerings.
22	Training partner redemption of training credits. Outsourced, commissioned telesales team. Engagement of large training resellers.
23	Shifting more to virtual learning.
24	Bundle training in certain size deals, selling and marketing training internally and externally.
25	eLearning Libraries
26	We have invested heavily in sales / marketing activity.
27	Customized events - shorter length courses more targeted, delivered in geographies close to our customer base.
28	self paced elearning for them to pay via ecommerce and take anytime anywhere
29	Banner ad on our company's web site home page 1-1 calls from me (Training Manager) to our regional sales directors
30	In 2009 we launched eLearning for our partners and customers, we also greatly increased our virtual classroom offerings for partners and customers who could not travel but still wanted a "classroom" experience
31	Virtual Classroom Expansion in China and India
32	LMS implementation
33	Virtual delivery Custom on-sites Heavy focus on pushing sales team to include education in all new deals Heavy focus on marketing (not focusing on discounts but more packaging and positioning on macro condictions and how to increase productivity, save money and time).
34	eLearning and Video based training Comprehensive "readiness" programs for employees and partners
35	ILT
36	Virtual training
37	Blended Learning and virtual lab access
38	Marketing, elearning, on site
39	Virtual learning classrooms - offering of global schedules
40	market segmentation appraoch new modalities that address business painpoints
41	Virtual Training
42	WebEx, and use of high level learning professionals embedded in internal customer organizations. They function as business analysts and training analysts, deploying solutions with significant bottomline impact.

What percentage of change is your training organization expecting to see in 2010 in the following measures?



		<-40%	-40% to -20%	-20% to 0%	0% (flat)	0% to +10%	+10% to +20%	>+20%	Mean
1	Students trained	0% (0)	1.89% (1)	3.77% (2)	20.75% (11)	30.19% (16)	35.85% (19)	7.55% (4)	5.17
2	Revenue	0% (0)	0% (0)	6% (3)	24% (12)	38% (19)	20% (10)	12% (6)	5.08
3	Margin	0% (0)	0% (0)	2.04% (1)	30.61% (15)	48.98% (24)	12.24% (6)	6.12% (3)	4.9
4	Headcount	0% (0)	0% (0)	8% (4)	48% (24)	26% (13)	12% (6)	6% (3)	4.6

Response: 53

What are your major challenges, moving into 2010?

1	Lack of training demand. Hiring creates demand for training, and many companies are not hiring.
2	Shortage of staff, lack of customer budget for training
3	- Establishing the value of training with customers with limited training budgets - how to get the training spend for our product training. - How to keep up with new products and more integrated solutions - how do you create training classes that meet the needs of companies working in the cloud?
4	Filling seats in classes in order to meet higher revenue goal and contribution margins. Keeping programs fresh and exciting
5	Sustaining the organization Reducing cost
6	localization, certification
7	increasing fill rates in public classes, development resources to build content, expand the accreditation program for our services partners, very limited budget for internal education initiatives
8	Decline in new name customers Limited Development Resources Decreased revenue unable to cover costs
9	Handling the growth of our company as well as making sure that our existing employees are receiving the training they need to continue to be successful.
10	Scalability of Instructors LMS LCMS Implementation
11	We are facing operational issues that inhibit our ability to scale the business for growth (poor LMS implementation, inability to process payment quickly, register students at last minute etc).
12	Getting enough training resources to catch up with the product release cycles.
13	decreased sales travel budgets still tight building expertise on new products added through mergers budget being split out to create a cost center for sales training
14	Scaling in terms of both content, new development with new products as well as maintenance of current with same size staff and same resources
15	still small customer and partner training budgets own company budget flat, so no additional headcounts, limited funding still travel restrictions more and more product releases which need to be supported new strategic products need to be trained
16	Scaling the business
17	Doing more with less.
18	Restructuring the organization and offerings to manage costs.
19	The economy. As the economy starts to recover, training dollars from customers will lag. The challenge will be to try and influence customers to release training dollars sooner than they might normally do.

20	Finding the right skill-set in prospective new hire(s). Getting people into open enrolllment classes. Keeping staff from travel burnout on high rate of custom/onsite training sessions.
21	I'm sure it's still going to be budget-related. We're also reaching the proverbial "tipping point" where we've grown dramatically over the past 4 years organically; we now really need to market and sell ourselves more effectively, and offer more compelling content.
22	Organizations budgeting enough for staff training and new license sales to improve new student enrollments.
23	Major product revamp and new platform updates requiring major curriculum overhaul - delivering to two releases throughout the year. Taking on internal product and technical enablement in addition to customer and partner training. Globalization of content and delivery. Bulk of training continues to be heavy onsite delivery with tailoring of content.
24	Make more money with the same staff.
25	SpringSource integration. Limits on marketing resources. Headcount squeeze. Increasing lab equipment-to-student ratios. New matrix management structure. Partner competencies program.
26	Increase revenue and find and monopolize upon what will continue to be valuable for customers. The training needs seem to be shifting for customers, and it is the analysis of that shift and addressing that which is the biggest unknown.
27	Limited resources. I am currently a training department of one. If I get headcount next year, I can do so much more. If not, everything moves along slowly. I am stuck with lots of ops work, which is time-consuming.
28	We have too many new products coming out that need training
29	Getting the ILT revenue back up
30	travel restrictions on company/partner/customer staff
31	We are counting on a major new product release to increase revenues, which should also increase demand for training. Our model is still instructor-led (either live or virtual), so we are resource constrained because we are very conservative. There are only 2 of us, and we are exhausted and our quality is suffering.
32	The economy Longer sales cycles Funding to get more course development basically every dollar is scrutinized more heavily.
33	Resources to develop and deliver content. Revenue
34	hiring serveral new key roles and getting them ramped quick enough to have impact on 2010
35	How to continue our revenue growth
36	We are working on some forward thinking development in eLearning yet our headcount remains the same. The reassigning of resources, working smarter and using open source tools for our development projects will be challenging. We're also looking at how cloud computing can enhance the delivery methods of training.
37	Increase revenue while maintaining margin
38	Headcount, new senior management, excutive buy in, strategy and leadership
39	fill rates in public classes selling value of education internally and externally EMEA is still dealing with macro economics NA is coming out of it slowly and we are seeing an uptick but still challenging keeping moral high amongst education team due to cut backs, forced vacations, and bonus cuts
40	Resources to handle all the initatives underway
41	Hiring the right people; Managing explosive growth/demand for training
42	Resourcing and course developing against increased demand.
43	acceptance of alternative delivery methods
44	training budget clampdowns, travel cost constraints
45	revenue growth
46	lack of additional investment in elearning
47	External sales reduced, internal travel restrictions, budget and headcount cuts for delivery staff.

What major initiatives are you taking to prepare for 2010?

1	More e-Learning including customized e-Learning.
2	More virtual class and going global with it. More self paced.
3	More e-learning. We need to better "bring training" to our customers.
4	- More web-based training - More VILT
5	Rolling out different programs. More rapid marketing campaigns to the global sales team (montly sales webinars) Expanding technical training classes
6	Drive virtual classroom and self-paced Continue focus on efficiency and lower cost operation
7	Certification, partner program development
8	restructuring development roadmap, extreme focus on individual objectives

9	Adding substantial amount of eLearning and rolling out new website that will be used as launch site for offering. Expanding offering to eBooks with corresponding 'lab environment' availability for hands on use of product. Large marketing campaign to push new products and sell independently of product sales.
10	As a way to provide information in a timely manner to a growing audience, we are exploring alternatives aside from classroom training and document sharing. This will likely include shared recorded content and possibly other website content.
11	Reducing in classroom time Training localization process Instructor Certification Hands on Labs and Technical solutions
12	Potential outsourcing of the day to day operations through a partnership with a vendor who can take on our LMS, enrollments, marketing reach, telesales capability etc. Changing the internal focus to tie ourselves to the enterprise deals and ensure education attachment
13	expanding vclassroom delvery expanding marketing of training
14	Just getting starting in evaluating and planning this; too soon to answer; must align with our business strategy for 2010
15	change business model to annaul subscription and high eLearning percentage eLearning like online courses, but also self paced
16	More E-learning Improving certification
17	Increase in Virtual Classroom and Self-Paced eLearning offerings.
18	Continue to focus on offering customers choices. Making the recent adjustments become a mainstream part of our business.
19	Launched and will expand product support certification program. Streamlining curriculum offerings. Revamped web pages. Refocused internal marketing to target Sales Engineers over Account Managers as better folks to actually sell the right training at the right time.
20	Launching video training offering. We've had training videos for years, but we really need to monetize it this year and get more content into our customers' hands which will lower their reliance on our Tech Support group.
21	More emphasis on OnDemand deliveries to reduce training cost to customers and reduce instructor cost for education. Hoping to make up difference in volume.
22	Moving to common content development platform for all curriculum and tailoring engagements. Adding Education Partner program. Formalized translation of portions of curriculum. Increase inside sales activity to drive volume transaction business higher.
23	Provide more self-paced learning.
24	More certifications. VMs within VMs for more lab gear. Business intelligence infrastructure projects. LMS expansion projects. Expanded training reseller program. Expanded academy program. Exploration of outsourced operations.
25	Continue to invest in virtual learning and the development of under-producting markets.
26	Modularize our training to deliver it online.
27	Use more authorized training partners
28	Cost reductions (Headcount) as well as more integrated training programs with our product sales force
29	Updated certification structure Continued investments in emerging markets
30	automation of certification exams revision of materials to support virtual classroom training additional funding through government grants
31	Trying to leverage resources in product marketing and technical services to help us deliver more training.
32	customer reaching initiative (using internal resources) customer reaching initiative (using external resources) marketing activities thru LMS
33	Self Directed End User Training Increased Virtual Learning Role Based Training
34	certification for partners certification for customers alternative delivery methods (virtual conferences, live virtual labs, learning community)
35	We'll be releasing social networking within our On-demand(eLearning) solution.
36	Expansion of virtual classroom (multiple sessions over several weeks) Self paced training Expansion of custom training
37	Big eLearning rollout, training for big new product
38	Lots of planning and making conservation assumptions Keeping a pulse on the macro conditions from CFO and news Coming up with creative ways to package and promote education
39	Readiness program for employees and partners Deeper content roadmap
40	refactoring ILT; launching eLearning and Virtual Classrooms
41	Business systems upgrades and improvements to scale the business better
42	innovation and sales methodology modifications

43	refocus on delivery modes elearning, virtual classroom..
44	more marketing more customised solutions more varied sales approahces more leveraging of online methodologies
45	Closure of training facility, use of contract instructors, reduction in staff, distance learning, focus on improving advanced skills (rather than training newhires on basic product knowledge), and learning interventions that immediately and dramatically impact internal customers' bottom-line and business initiative.