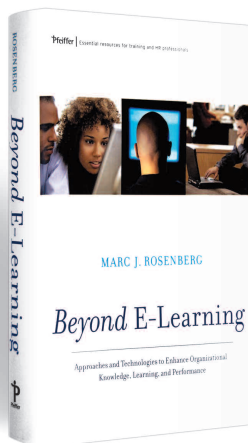




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by Marc J. Rosenberg

Approach and Technologies to Enhance Organizational Knowledge, Learning and Performance

BEYOND E-LEARNING

THE SUMMARY IN BRIEF

Organizational and e-learning expert Marc Rosenberg addresses three critical questions in his book *Beyond E-Learning*: Where is e-learning — and organizational learning in general — heading? What are the learning challenges and opportunities that organizations face as they depend, more than ever, on the talent and expertise of their people to win in the marketplace? What's the best role for technology to play?

This summary shows that real impact happens through a confluence of workplace learning and performance strategies — not just e-learning or classroom training. It offers a timely roadmap that integrates training, e-learning, knowledge management, collaboration and performance support to help bring about successful and sustainable organizational learning and performance improvement.

Sharing ideas from some of the most prominent leaders in the field of e-learning, Rosenberg explains the most current thinking on how organizations learn and apply what they know to be successful. Going beyond current practices, common myths and misconceptions about training and e-learning, this summary explores the increasingly important role that technology plays, not as an end in itself but as a vital means to get there.

IN THIS SUMMARY, YOU WILL LEARN:

- How to take advantage of an increasingly wider array of learning and performance approaches and technologies in the context of work.
- How to leverage organizational know-how.
- Smart ways to change how organizations improve performance and learn.
- How other organizations use an increasing variety of solutions now available to enhance learning and performance.

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THE COMPLETE SUMMARY: BEYOND E-LEARNING

by Marc J. Rosenberg

Myths and Warning Signs

“E-learning” is *not* “e-training.” It is too important to be limited solely to instructional solutions. For all the efforts of two generations of research and practice, the most recent data suggest that e-learning is still a small piece of the overall training pie. A 2004 *Training Magazine* survey reported that only about 17 percent of all training is delivered by computer (another 8 percent of all training is delivered by an instructor via a “virtual” classroom) and as much as 70 percent of all training is delivered in the classroom (another 5 percent was allocated to “other”).

The Myths of E-Learning

The over-hyped promise of e-learning was in part fueled by nine myths:

1. Everyone understands what e-learning is. Without agreed-on definitions and a common framework for thinking and talking about e-learning, confusion reigns.

2. E-learning is easy. Building and deploying great e-learning takes real effort, discipline and experience in fields such as instructional design, information design, communications, psychology, project management and psychometrics.

3. E-learning technology equals e-learning strategy. You can't select the right learning management system, authoring tool or any other part of your e-learning infrastructure before you have a comprehensive learning strategy that positions the technology appropriately.

4. Success is getting e-learning to work. True success for e-learning is in how well it strengthens performance and the business.

5. E-learning will eliminate the classroom. Classroom-based training continues to have an important role, albeit a somewhat changed one.

6. Only certain content can be taught online. With the right instructional design, almost any type of knowledge or skill can be developed and delivered online.

7. E-learning's value proposition is based on lowering the cost of training delivery. E-learning's real economic value is in the money it saves its clients by shortening the time it takes to improve worker skills.

8. If you build it, they will come. Getting people to use and accept e-learning will take work and time.

9. The learners are the ones who really count. A focus on learners to the exclusion of other constituencies reflects traditional training organization thinking at a time when the training function must be much more integrated into the business mainstream.

Warning Signs

Most organizations have e-learning strengths and weaknesses. E-learning strengths open doors of opportunity, innovation and value. Weaknesses can lead to waste and disillusionment. Knowing where you stand, and what to do about it, makes all the difference. If you're inside a business or a government agency, how do you know if your learning (and e-learning) initiatives are in jeopardy? From the perspective of an outside consultant or service provider, how do you know that your client is moving in the right direction? Look for these nine warning signs:

1. Technology without strategy.

2. Weak focus on business and performance requirements.

3. Minimal e-learning expertise.

4. No attention to the unique attributes of e-learning design.

5. Weak assessment.

6. No focus on informal, workplace learning.

7. No governance.

8. Weak sponsorship.

9. Failure to manage change. ■

The author: Marc J. Rosenberg is a management consultant in training, organizational learning, e-learning, knowledge management and performance improvement. Dr. Rosenberg is a former president of the International Society for Performance Improvement.

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Learning, E-Learning and the Smart Enterprise

A **smart enterprise** is a high-performing organization that allows knowledge and capabilities — enabled by technology — to grow and flow freely across departmental, geographical or hierarchical boundaries, where it is shared and made actionable for the use and benefit of all.

A smart enterprise begins with a high-performing work force, supported by a performance-enhancing workplace environment. It is an organization where this knowledge is collectively, systematically and efficiently applied for valued purposes, such as business growth, operational improvement, product development, new market acquisition, customer satisfaction and the enhancement of employee performance.

Characteristics of the Smart Enterprise

Looking at the characteristics of a smart enterprise more deeply, there are five key points to emphasize:

- **A focus on knowledge and application.** The smart enterprise is sustained by what the collective employee body knows and is able to do as a result, especially when the “doing” is creative, insightful or innovative, even if it involves trial and error.

- **The effective use of technology.** Pervasive connectivity and mobile computing will contribute to increasingly decentralized work where, from 2007 going forward, beginning in the United States, knowledge workers may spend most of their time working outside the traditional office.

- **A systematic and a dynamic approach.** The smart enterprise exists only through the systematic coordination and collaboration of the smart individuals who comprise it and the knowledge each carries.

- **An emphasis on both individuals and teams.** The smart enterprise is centered on the performance of teams, organizations and business units, and this is a reflection of the knowledge and capabilities of individuals who make up these groups.

- **A performance foundation.** The metrics that matter to the organization are its readiness measures, including productivity, individual performance metrics, team or small-group performance metrics, and business metrics, as dictated by its strategy, and operational goals and objectives.

Online Training

Beyond the classroom, online training can reach people who are dispersed geographically, and it allows large numbers of people to participate in a course. This can markedly improve the efficiency of training, enabling more instruc-

Lessons Learned

Like the rest of the Internet and the knowledge economy, the e-learning phenomenon is finding its own path and moving in new directions. Here are five important lessons learned:

- **We have over-relied on technology.** We should think of technology as an enabler, not a strategy.

- **We have spent too much time in the training center.** We should truly integrate ourselves more with other key business operations.

- **We have often spoken a foreign language.** We should tone down our jargon and speak the language of our clients.

- **We tend to think this is easy.** We must avoid trivializing human learning and performance and recognize that this is hard, professional work.

- **We want immediate results.** New ideas need a gestation period and a time for experimentation.

tion to be delivered to more people at a lower cost.

Technology does more than just support a more comprehensive set of learning and performance tools. It also has altered the nature of work. It enables more virtual work arrangements and the ability to organize globally. The universality of desktop computing and the Internet has radically changed business and is doing the same for learning.

How Smart Enterprise Thinking Changes the Nature of E-Learning

The most important aspect of the smart enterprise as it affects e-learning is the direct integration of e-learning into business processes and activities. This means that consideration of learning and performance issues takes place much earlier in the development of new systems, tools and work processes. It also means that training organizations have to rethink how they are positioning themselves going forward.

Smart enterprise thinking always begins with questions like, “What are we trying to accomplish?” rather than questions like, “How can we use training?” This requires much more initial analysis and decision making. Most important, it requires an open mind to solutions that have nothing to do with learning and more to do with the culture, constraints, incentives, resources, tools and support people have for doing their job. Fix the environment, and learning can flourish. ■

Building a Learning and Performance Architecture

During the Internet bubble, when Lucent Technologies was soaring, it could easily afford classroom training and

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the costs that came with it. So online training was only 10 percent of the company's total training activity, and training centers bulged with activity. When the crash came and training budgets shriveled, Lucent completely reversed itself and tried to provide more than 90 percent of its training online. But it found that an over-reliance on one delivery strategy was neither as economical nor as effective as the company assumed. A balance of about 65 percent classroom and 35 percent online training ultimately became its more reasonable — and realistic — goal.

Like Lucent, what most companies are looking for is a way for e-learning and classroom training to coexist and even benefit each other. One approach has been to adopt blended learning.

Blended learning is the integration of group and self-paced instruction, usually manifested through classroom and online delivery. Decisions on how to blend are based to some degree on instructional design considerations, that is, how best to present training materials to facilitate effective learning (and ultimately improve performance), and on business considerations, including cost and productivity issues, such as speed of deployment, scalability, time in training and updatability.

The Learning and Performance Architecture

A **learning and performance architecture** is a systematic integration of approaches that facilitates both formal and informal workplace learning and support and, ultimately, improved human performance.

The architecture describes a model of how these approaches relate to each other and is based on five important truths about where learning and learning technology must go to fulfill the promise of the smart enterprise:

- Most learning takes place on the job.
- Learning is not training.
- Training, even online training, is incapable on its own of supporting all the learning needs of employees, partners, suppliers or customers.
- Technology has demonstrated a powerful capability to enable work force productivity, and it can do the same for learning.
- Learning effectiveness is extremely important in the smart enterprise, but it does not, in and of itself, constitute the ultimate value proposition. That comes from the improved level of work force performance.

Redefining E-Learning

Within the learning and performance architecture is e-learning — not e-learning as it is traditionally practiced but a broader, more inclusive definition of *e-learning*:

E-learning is the use of Internet technologies to create and deliver a rich learning environment that includes a broad array of instruction and information resources and solutions, the goal of which is to enhance individual and organizational performance. In this definition, both instructional and information solutions are employed. Not all learning requires an instructional solution.

Performance Support

Performance support (or electronic performance support) is a tool or system, often computer based, that provides electronic task guidance and support to the user at the moment of need.

With the right tools, people can perform at a higher level than they would have been capable of on their own.

Although mentoring and coaching are often overlooked as a viable learning strategy, organizations with a strong mentoring and coaching culture tend to show more smart enterprise characteristics.

True Blended Learning

An expanded view of blended learning includes the combination of training (formal) and non-training (informal) approaches that support the smart enterprise (such as knowledge management, performance support and coaching) in ways that improve the effectiveness and efficiency of learning.

The growth areas with the most promise and most challenge are those on the informal, work-based side: knowledge management and performance support. Like the architect of buildings, architects of learning and performance should be well versed in this expanded toolkit. ■

Knowledge Management in Action

Knowledge management (KM) is the creation, archiving and sharing of valued information, expertise and insight within and across communities of people and organizations with similar interests and needs, the goal of which is to build competitive advantage.

KM is composed of three interconnected and interdependent components:

1. Information Repositories. New approaches to managing documents and other physical knowledge assets have been nothing short of a revolution in information management and distribution, as well as a revolution in learning, because of the enhanced ability to update a broadly distributed work force and keep content up-to-date in real time.

2. Communities and Networks. People learn with

and through others as they build relationships.

3. Experts and Expertise. Essential to the success of any collaboration effort is the availability of experts and expertise. Your goal with KM is to turn undiscovered knowledge into *common* (or organizational) knowledge — knowledge that everyone who needs to know (or know about) actually does. KM enables the easy and systematic creation of knowledge and facilitates its dissemination so that it is commonly known. It creates opportunities for collaboration that bring undiscovered ideas to the surface, where they have value.

Knowledge Management Applications

Whenever people need to share information, work in teams or improve the efficiency of projects, KM can be a valuable tool. Sometimes KM reduces the need for training; other times it augments it. The key is considering all KM approaches as viable options when making design and implementation decisions.

KM can be applied across several organizational functions, including call centers and customer care, customer relationship management, e-commerce, government, human resources, information technology, partner-supplier relationships, professional services and sales.

The biggest user of KM is undoubtedly the military. The U.S. Army's information needs are so voracious that its KM system, Army Knowledge Online, had more than 6 trillion documents in 2003, making it one of the largest online repositories in the world.

Building Knowledge Repositories

The approach to building knowledge repositories is systematic and replicable. It borrows the best from other processes, including training design and development, information design, human factors, software development, library science and social systems, to name a few. There are three primary stages in the process:

- 1. Knowledge capture:** Identifying and gathering the right content
- 2. Knowledge convergence:** Organizing and storing the content
- 3. Knowledge access:** Providing user access to knowledge

The Knowledge Management Development Framework

The process to follow in building a KM solution is not unlike other systematic processes. It has four major phases: diagnosis, solution definition, design and development, and implementation.

In building a successful KM solution, it is important to

work across five key components of the final system: strategy, management and governance, procedures, applications and tools, and technical infrastructure and architecture.

A Team Approach to Knowledge Management

Knowledge management solutions, whether they are just information repositories or include more extensive collaborative communities, cannot be built by training departments alone. Most training organizations, including corporate universities, do not have the charter, sponsorship, reach, resources or expertise to provide a complete solution alone. KM is interdisciplinary. It involves a deep understanding of how people learn and use information, a sharp focus on business objectives, and extensive technological prowess. It is a team effort. ■

Learning Through Online Collaboration

Knowledge management tools greatly enhance informal learning by facilitating the delivery of information at the moment of need and in the context of work. To be most effective, KM systems must also support collaboration among individuals and groups, peers and experts alike.

Organizations that focus most of their resources on building massive knowledge repositories and ignore the collaboration side of KM miss out on tapping the huge reservoir of talent and expertise inside the business. When collaboration is not supported and rewarded, new ideas and innovations are slower to emerge, redundant efforts proliferate and practices tend to stagnate. Nevertheless, simply deploying tools that support collaboration, such as chat-rooms, threaded discussion or instant messaging, does not guarantee that your organization will be more collaborative if you don't have a supportive, knowledge-sharing culture.

Communities

Communities, or **communities of practice**, are trusting groups of professionals united by a common concern or purpose, dedicated to supporting each other in increasing their knowledge, creating new insights and enhancing performance in a particular domain. They are people who need to work, learn from, and help each other achieve business goals.

Most communities serve four key functions:

- **They are nodes for the exchange and interpretation of information.**
- **They can retain knowledge in “living” ways, unlike a database or a manual.**
- **They can steward competencies to keep the**

organization at the cutting edge.

- **They provide homes for identities.**

Communities can be organized vertically or horizontally. Vertical communities are more common, generally representing an organizational structure, usually based on reporting relationships.

Horizontal communities are relationships between people with similar interests and needs, independent of reporting relationships.

Critical Success Factors

More communities fail than succeed. The community must offer sufficient value for members to become engaged, yet people must participate in order to create value.

For communities to succeed, that is, for members to value their participation and for the community to be valued by the organization, it is important to focus on critical success factors, including: peer identification, content value, incentives, removing risk to participation, making it special, community leadership, support from the top, no “Big Brother” spying, the right environment and the right tools.

Collaboration Technologies

Collaboration technologies allow people to participate asynchronously, contributing to the group at a time of their own choosing and, when warranted, synchronously, in virtual teleconferences or Web conferences.

Collaborative technologies, sometimes referred to as groupware, run the gamut, from specialized tools like Web conferencing, to general everyday tools such as e-mail. Many of these tools also come under the banner of “social software,” which enables people to organize themselves into a network based on their preferences.

The technologies of collaboration, in communities or with experts, expand the notion of e-learning. They enable new sources of knowledge, that is, peers and experts, to share what they know in real-time work settings. These technologies can and often should be incorporated directly into training programs. But their real contribution to learning and smart enterprise thinking is in extending the opportunities to share knowledge long after the course is finished or actually replacing the need for some training altogether. ■

Learning and Performance in the Context of Work

Ultimately the hallmark of a smart enterprise is to make learning and work indistinguishable from one another. New advances in technology have contributed

tremendously to work force productivity. This emerging technological workplace environment creates new and abundant opportunities for integrated learning and performance solutions.

Electronic Performance Support

Where performance support was once manifested primarily in paper-based job aids, it is increasingly electronic, with software development and performance-centered design as the overarching methodologies for building these products.

An *electronic* performance support system (EPSS) uses software to assist people in achieving a level of performance they would not otherwise be able to achieve. Building performance support solutions requires a deep understanding of what people have to do or accomplish, that is, the performance, and the processes they need to go through to get there.

Benefits of Performance Support

Performance support represents an additional expansion of the learning and performance architecture to a point where learning, while beneficial, may be a secondary goal. In the performance support world, getting the job done is what matters; internalizing the why’s and the how’s are less important.

Here are five key benefits of performance support:

- **Makes work simpler.** Salespeople, for example, can use a performance support tool to prepare a proposal for a client that suggests different types of proven pitches, gathered from past successful efforts and placed in a repository for easy downloading.
- **Configurable.** Users can format an EPSS to their own needs.
- **Provides high scalability.** As software, electronic performance support can be quickly rolled out to a few people or to thousands.
- **Fosters performance consistency and reliability — to a point.** Performance support can reduce variability in the way people perform work tasks, which can be especially critical in technical or high-risk areas.
- **Allows the non-expert to perform closer to the level of experts.** This may be the most important benefit of performance support: allowing individuals to perform with similar speed and limited error rates as if they were more proficient than they actually are.

Embracing New Opportunities

Embedding learning not simply into the workplace but into the work itself expands the focus beyond learning to individual and organizational performance.

You must implement an effective change management and communications strategy to win the hearts and minds of workers and executives alike. Creating a leadership culture that values learning and performance improvement is also essential. Finally, you must recognize where non-learning solutions are appropriate, to either reinforce a learning environment or address performance problems and opportunities where learning solutions, including e-learning solutions, will not work. For smart enterprise thinking to become integral to your organizational culture, these three areas must be considered. ■

Making the Change Happen and Making It Stick

Change management is critical to implementing new and durable approaches to learning. There are 13 change management success factors that must be addressed to ensure that new learning initiatives, especially those that represent approaches that are far from traditional, will endure.

Here are the success factors to consider when building a change management plan:

1. **Get leadership onboard early.** Nothing is more important to the success of a new learning initiative than the support of key leaders and visible role models.
2. **Tout success stories.** Success stories will give the broader population a way to truly understand that “if they can do it, so can I.”
3. **Focus on early- and second-wave adopters.** Some of the best people to motivate others to try out new formats for learning and performance are early adopters.
4. **Avoid consequences and build incentives.** When introducing a new way to learn, remove consequences of participation and provide the right incentives.
5. **Build a solid value proposition based on a clear vision and attainable benefits.** The clearer and more precise you are on the value proposition, the more likely you are to get long-term support from executives.
6. **Involve stakeholders and constituents throughout the process.** Those who are involved in the creation of something new are much more likely to support it.
7. **Avoid a “this won’t work” message.** Positive communications can significantly counter feelings that the project is going to fail.
8. **Set priorities.** The priorities of end users and sponsors go hand-in-hand with their view of the project’s likelihood of success.
9. **Dispel fears of technology.** Provide adequate training and human support.

10. **Give people time to adapt.** Almost all change initiatives find resistance early on. But it’s far worse when people feel that they’re being rushed into something they’re not sure of.

11. **Don’t forget training.** It should be personalized to the user’s skill and experience level, allow plenty of practice and provide realistic scenarios.

12. **Provide ongoing support.** The best change management efforts extend well beyond initial deployment, with continued training, help lines, newsletters, support Web sites, testimonials, success stories and case studies.

13. **Don’t confuse “I can’t” with “I won’t.”** Don’t mistake *resistance* to change with *inability* to change.

A good communication plan is a key element of a solid change management strategy, the goal of which is to move people through three adoption stages: from awareness, to understanding to preference. ■

Championing Learning

Whether your new project represents incremental improvements, like adding new courses or upgrading your technology, or a fundamental change in your learning and e-learning strategy, be sure your sponsors are onboard as you begin. This avoids surprises and disappointments later and gets influential allies involved from the start.

Governance

One critical leadership area that is often overlooked is governance: the overall decision-making process and management of your learning strategy and resources across the smart enterprise. Even if you have only a single training group, you can benefit from sound governance as it will help you build better working relationships across your organization.

Learning and e-learning governance can range from a formal decision-making body with lots of control and power to an informal collaborative body that simply keeps everyone apprised of what’s going on. Either way, governance helps avoid duplication of effort and provides opportunities to leverage resources better.

A governance program can give you a single voice to executive leadership, including important business unit leaders and the CIO; provide more leverage for learning among enterprise priorities; and provide everyone with a more strategic perspective. It will help you find ways to centralize scalable assets and programs, such as technical infrastructure, professional development and vendor management, while decentralizing areas that meet diverse business or local needs, such as content development and delivery. And it will help you develop a more

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comprehensive staffing plan — one that best uses your precious learning and technical talent.

If We Build It, Will They Come?

Building a highly trained work force is merely a step on the way to building a smart enterprise and enhancing the organization's ability to learn and innovate. You'll never get there if you haven't moved people beyond simple awareness of new ways to learn to preferring new ways to learn. You're likely to go nowhere if you can't get sponsors onboard, or if you can't bring all your resources and allies together under one tent. But if you build it well and lead the way, they will come. ■

From E-Learning to Learning to Performance

In the early part of the 20th century, the railroads carried almost 90 percent of intercity passenger traffic in the United States, especially on trips of more than 300 miles. They were reasonably priced, safe and comfortable, and they were constantly improving, albeit incrementally. In the 1920s and 1930s, airplanes began flying people between cities. Travel by air was expensive, risky and uncomfortable, but it was faster. Air travel was a radical change in how people got from point A to point B.

Four Principles for Moving Forward

Moving beyond current thinking and perceptions of e-learning will likely require you to reinvent the way you talk about and practice it. You must reflect the need for speed and greater efficiencies, and the emergence of new thinking about learning and performance. Getting there involves adherence to four main principles:

- **Heed the warning signs.** Look around for tell-tale signs that your efforts are in trouble or heading that way. Embrace your strengths, but don't ignore your weaknesses.
- **Reinvent what you do.** Reinvention is not always about trashing what exists; rather, it is about improving what you are doing and moving on from there.
- **Redefine your world.** New technologies and new requirements are changing the landscape, so go (smartly) with the flow.
- **Put yourself in the bigger game.** Get into the workplace and become a valuable partner in solving real business problems with the least disruption to work as possible. Figure out how to help mainstream business activities and get operational functions to embrace what you do and what you can offer.

The railroad goliaths looked at these fledgling airlines with amusement. If they wanted to, they could have bought up all the airlines for pocket change. Today, passengers might be flying the Burlington Northern Airline, the Santa Fe Airline or even the Amtrak Airline. But the railroads made a fundamental mistake in their thinking: They saw themselves in the railroad business, not in the transportation business. They defined themselves narrowly. They didn't see change coming and stuck to their safe, comfortable ways. Today, 90 percent of intercity passengers travel by air.

Moving Beyond E-Learning

You have a similar choice to make when it comes to moving beyond e-learning. Like the railroads, you can stick to what you know and do well. You can continue to focus on training and continue to see yourself in the training business. A highly trained work force is essential for a successful business, and there will always be a need for quality classroom and online training. So, of course, do training well, but don't stop there.

The railroads didn't see themselves in the broader transportation business, but you can position yourself and your organization in the broader learning business and, more important, in the performance business. You can embrace both the classroom and the workplace by embracing different and expanding roles, with new responsibilities, increased challenges and greater impact.

Moving beyond e-learning is not simply moving to new technologies or new approaches for training or learning. It is a transformation of the first order; the relationship that people have with what they know, how they know it and what they do with it is profoundly changing. The learning and performance field is being refined in the emerging smart enterprise, and the train is leaving the station. Are you onboard?

With the willingness to accept change, follow divergent paths and construct new goals and objectives that may be served by our emerging "e" technologies, who knows what remarkable wonders lay beyond e-learning? ■



If you liked *Beyond E-Learning*, you'll also like:

1. *What Got You Here Won't Get You There* by Marshall Goldsmith with Mark Reiter. The corporate world is filled with executives, but only a handful of them will ever reach the pinnacle.
2. *Wikinomics* by Don Tapscott and Anthony D. Williams. He authors address how the Internet's social network offers new, decentralized ways to produce content, goods, services and profit in the emerging world of massive peer collaboration.
3. *Blueprint to a Billion* by David G. Thomson. This is a valuable guide to the seven essentials that top companies need in order to achieve exponential growth.