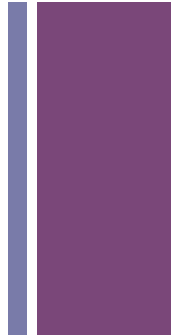


# WHERE ELEARNING IS HEADED: A VIEW FROM THE OTHER SIDE

Ellen Wagner, Sonoma Partners, LLP

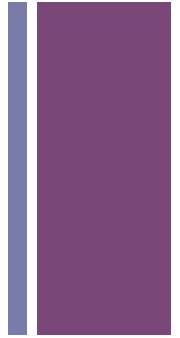
## + What the Program Says:

- What is the current status, the future directions and predictions made by business analysts who track global technology trends and the future of elearning?
- How are these emerging trends likely to affect higher education institutions and the services offered to savvy digital consumers?
- What are some of the themes and interests shared by the analysts who observe the higher educational environment and those who track commercial developments?
- What are some of the noncommercial examples of the next generation elearning that point the way to the future?



# + What I'm REALLY talking about:

- Living on the Fault Line
- “Who You Gonna Call?”
- The Pursuit of Bright and Shiny Objects
- The Dawn of Knowledge Commerce





# Living on the Fault Line

11/19/08

# Contrasting Cultures from the HED Perspective

(Carl Berger, University of Michigan, 2005)

## What Vendors Care About

Broad adoption (“How many iPods did you give away at Duke?”)

10% involvement by 90% of the users

Quick Measures

Single instances of numbers (e.g. 5% CTR)

If all things do not work, the project is a failure

Proof points, use cases

Promises

Making the sale



## What Colleges and Universities Care about

Innovation ( “What changed when the iPods were introduced into the curriculum at Duke?”)

90% involvement by 10% of users

Complex measures

Complex analysis (e.g., multiyear impact study)

If some things work, the project is a success

Empirical Evidence

Proof

Living with the decision to buy



Who You Gonna Call?

## + Where Do Academics Get their Research?

“The Literature”

Associations  
(WCET, NMC, EDUCAUSE,  
others)

ECAR

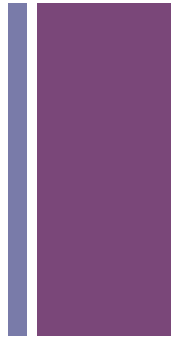
Campus Computing Project

NCHEMS

IPEDS

Chronicle of Higher Education

Others...



## + From the “business side”, research includes:

Business Literature:

Gartner Research <http://www.gartner.com/>

Forrester Research <http://www.forrester.com/rb/research>

IDC <http://www.idc.com/>

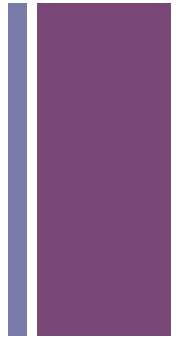
Frost and Sullivan Research

<http://www.frost.com/prod/servlet/frost-home.pag>

Datamonitor <http://www.datamonitor.com/>

AMR Research <http://www.amrresearch.com/>

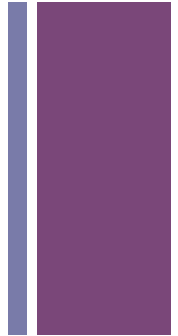
eMarketer <http://www.emarketer.com/>





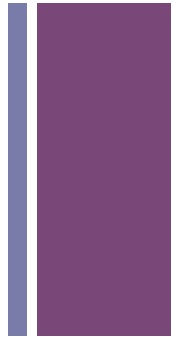
## + (e)Learning Industry Research

- eLearning Guild <http://www.elearningguild.com/>
- Bersin Associates <http://www.bersin.com/>
- Brandon Hall Research <http://www.brandon-hall.com/>
- American Society for Training and Development <http://www.astd.org/>
- Masie Center <http://www.masie.com/>



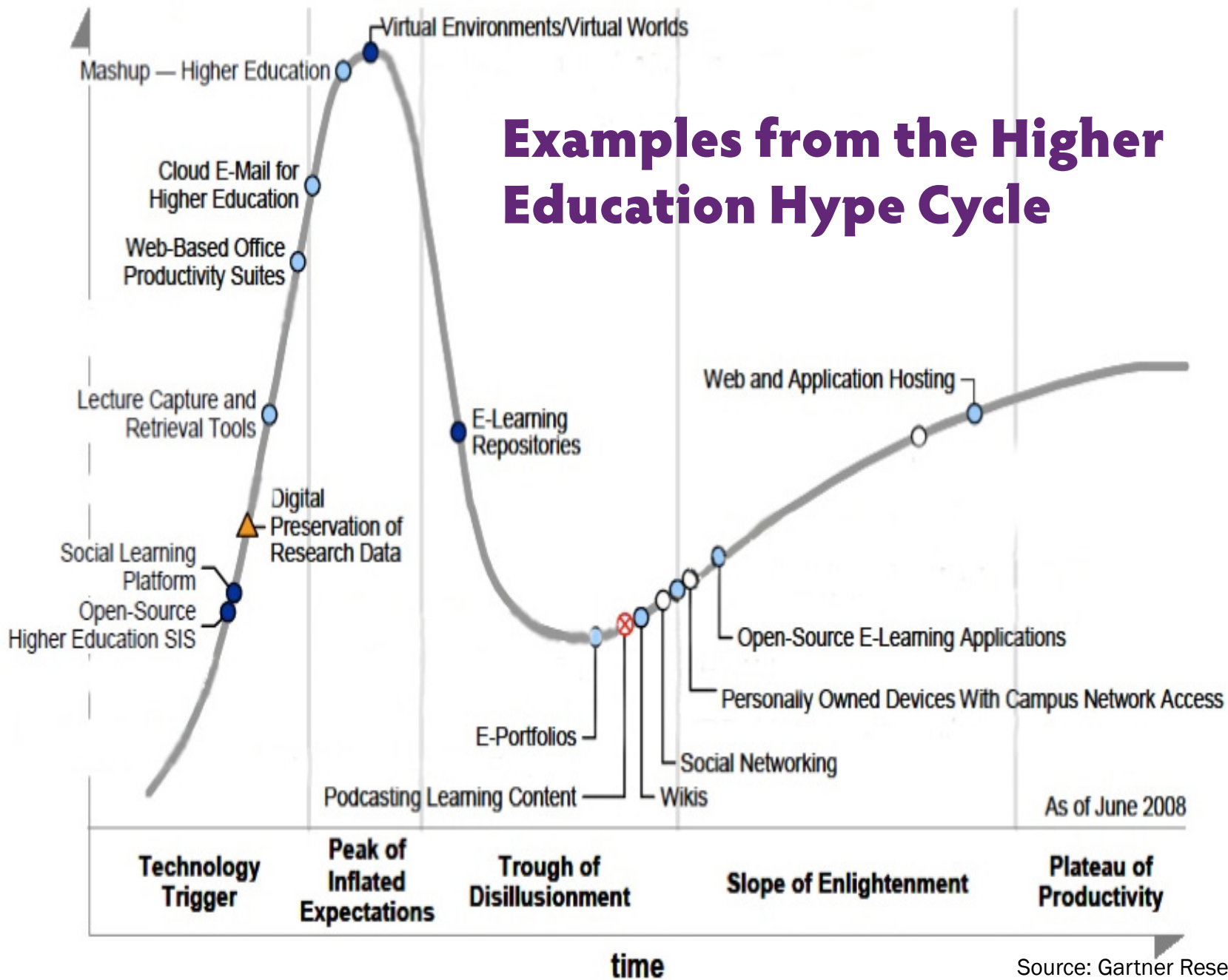
## + Scanning the environment

- Media Newswire <http://media-newswire.com/>
- Tech Crunch <http://www.techcrunch.com/>
- Venture Beat <http://venturebeat.com/>
- The Long Tail <http://www.thelongtail.com/>
- Wired <http://www.wired.com/>
- Valleywag <http://valleywag.com/>
- Reuters Business and Finance <http://www.reuters.com/finance>
- eWeek, <http://www.eweek.com> Information Week  
<http://www.informationweek.com/>
- Economist <http://www.economist.com/>, Harvard Business Review,  
[http://www.hbsp.harvard.edu/b02/en/hbr/hbr\\_current\\_issue.jhtml](http://www.hbsp.harvard.edu/b02/en/hbr/hbr_current_issue.jhtml)  
MIT Tech Review <http://www.technologyreview.com/magazine.aspx>

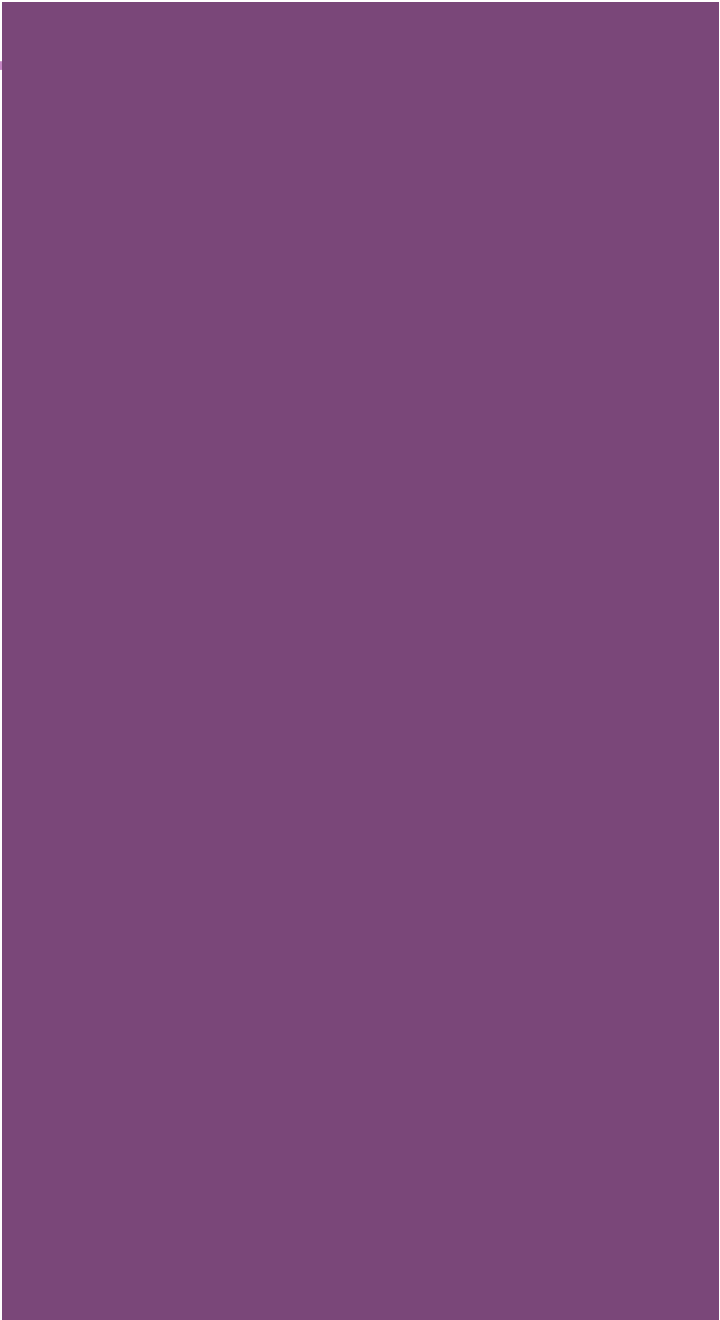


## + The Gartner Research “Hype Cycle”

PHASE	BENEFIT RATING	MATURITY
Technology trigger	Transformational – new ways, major shifts	Embryonic
Peak of Inflated Expectations	High – new ways, big revenue impact	Adolescent
Trough of Disillusionment	Moderate – Incremental improvements. Some revenue impact	Early Mainstream
Slope of Enlightenment	Moderate – Incremental improvements. Some revenue impact	Mature Mainstream
Plateau of Productivity	Low – slightly improves, doesn't impact revenue	Legacy
		Obsolete



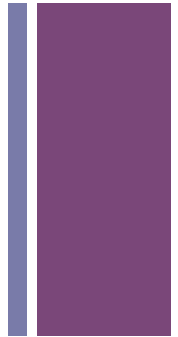
Source: Gartner Research, 2008



# The Pursuit of Bright and Shiny Objects

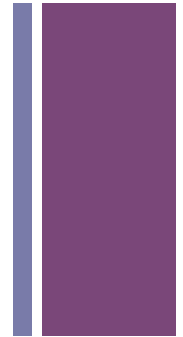
## + Sustaining Innovation

- We are all attracted to what is new, different, possible.
- We need a balance between fascination for new technologies compared with commitment to scalable, sustainable innovations that serve the needs of our stakeholders.
- Institutions and enterprises that want to remain relevant and grow need to consider the construction, management and distribution and delivery of digital courses and content and experiences coming from commercial publishers and trusted contributors, in a world that is connected always and all ways.

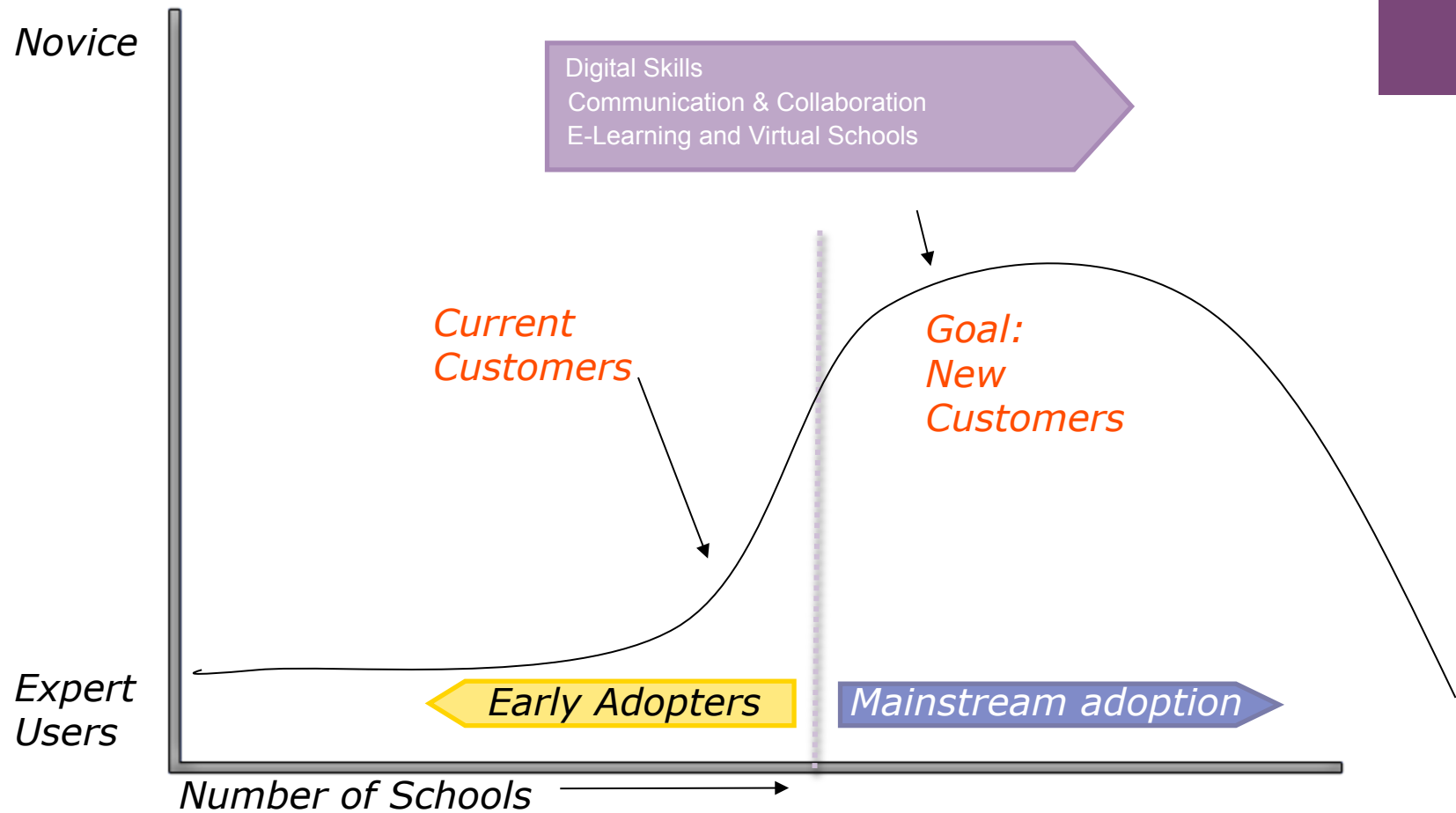


## + Consider Web 1.0, 2.0., 3.0., 4.0.....

- Web 1.0 – The Publishing Web, focused on digitizing, posting and distributing content.
- Web 2.0 – the Social Web. Focused on interaction, engagement, community, experience.
- Web 3.0 – the 3D web. Most notable for developments in the areas of virtual worlds and massive multi-user online games.
- Web 4.0 – “Everyware” - ambient and omniscient.



# + Innovation is the Tip of the Iceberg







# Knowledge Commerce: The Next Frontier

THANKS!!

FOR MORE INFORMATION:

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