



# How to Boost Business Revenues with Learning 2.0 Portals

New Ways for Training Executives to Empower Channel Partners and Win Loyal Customers

“Your learners are there to learn, not to learn how to use your training registration tool.”

Tom Clancy  
VP, Education and Productivity  
EMC



**Where Learning Means Business**

## What's Inside

---

Does your organization depend on channel partners, resellers or customers to generate top-line revenues?

It's a fact that the more quickly and effectively you can share critical business knowledge with your business partners, the more successful they'll be.

But in a time where budget cuts and shrinking staff are the norm, it's more difficult than ever to educate your business allies and customers.

So, how can customer and partner training programs transcend these limitations to make learning more accessible and effective than ever?

This white paper explores a new model for driving customer loyalty and partner success through Learning 2.0 portals.

# Table Of Contents

---

The 2.0 Portal Model – Not Your Father’s LMS	4
Learning 2.0 Portals – What Role Can They Play?	6
Case Brief: Learning 2.0 – Up Close & Personal	8
Mapping a 2.0 Portal Strategy – A Marriage of 5 Elements	9

## Featured Tools

Estimate Lost Revenue from Untrained People	10
Quantify Top Line Revenue Due to Increased Training	11
Choosing a 2.0 Portal Vendor – A Checklist	14

# The 2.0 Portal Model - Not Your Father's LMS

Uncertain times are suddenly forcing learning leaders to sharply align training initiatives with business imperatives. In an environment where single-digit sales growth is the new Holy Grail, every incremental increase in sales revenue is appreciated. That's where Learning 2.0 Partner Portals can make a measurable difference – empowering global sales partners with critical product knowledge, faster and more cost-effectively than ever.

In 2008 the average training organization lost 30% of its staff and 11% of its budget, according to a study by training industry analysts Bersin & Associates. While the jury is still out on what the future holds, so far it does not appear that budgets and staff will be completely restored to pre-recession levels.

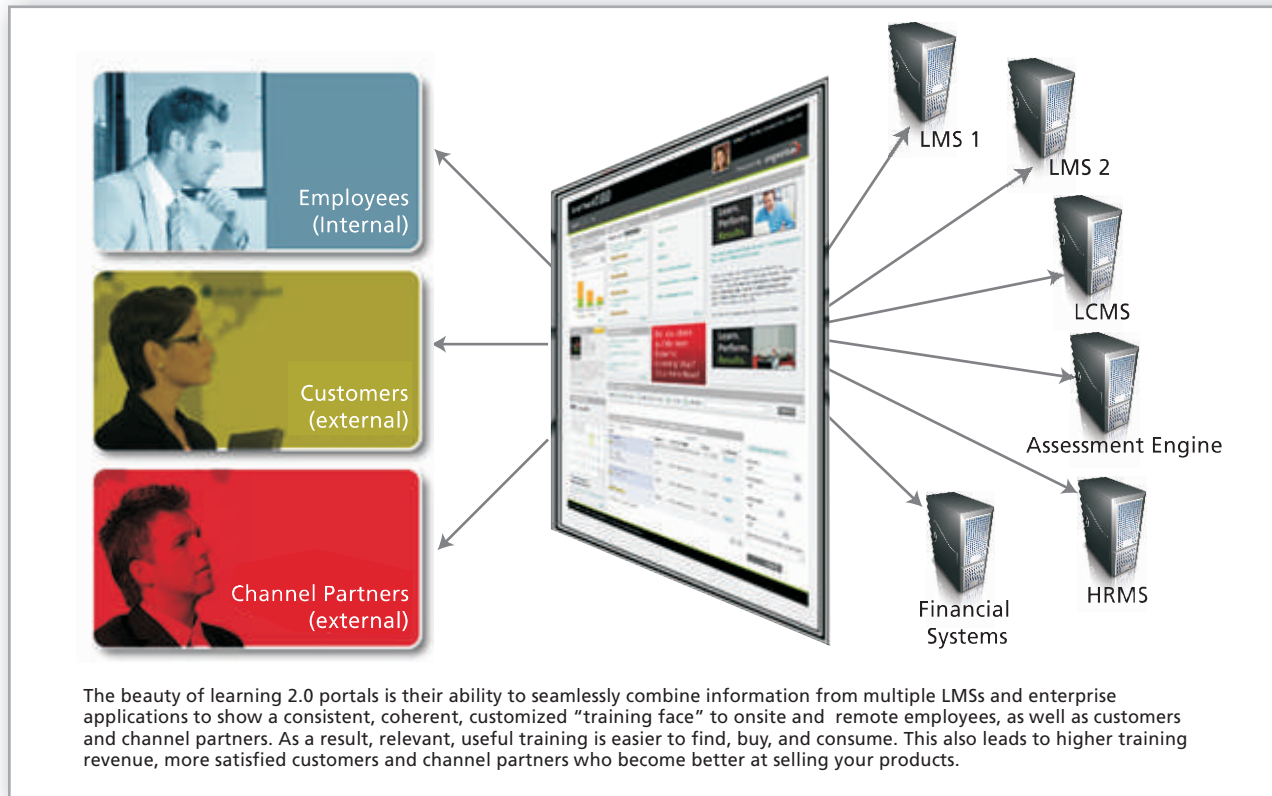
Amid all this belt-tightening, training requests continue to mount from your business units and channel managers, as everyone attempts to squeeze efficiencies from remaining people and resources. Cutting end-user training is off limits – as that slows the next sales cycle among existing customers – those most likely to buy more of your products and services.

## Barriers To Learning – Beyond Just “Lean Times”

Even in healthy economic times, too many learners don't get the training they need because of problems getting access to training – especially among partners and customers, who are outside of your organization:

- Work schedules or geographical location don't line up with ILT classes;
- Firewall issues create insufficient access to internally-delivered eLearning classes;
- Learning management system (LMS) interfaces make finding and registering for correct training overly confusing or time consuming;
- It's simply hard for learners to determine what training they need to take.

Good times or bad, to some degree you're always fighting a learner 'reach and teach' problem. Only



## LMS Limitations are Real

Unfortunately, LMSs are not designed for learners who seek easy on-demand access to personalized planning tools, as well as meaningful knowledge and skill-building content.

now you're facing this problem after being hit with the largest budget cuts in a generation.

More likely than not, your training organization relies on a traditional learning management system (LMS) to administer and track your training programs. And if you're like most training professionals, you're likely to be unhappy with your LMS in several respects – including its accessibility, relevance and simplicity in serving the interests and needs of business partners and customers outside your organization's walls.

LMSs do many things well, but they're not designed for your external learner audience. The typical LMS is designed to be used by a trained learning administrator, not by John the salesman who needs to find a course on the features and functions of a new product. It can be helpful to examine why today's learning management systems often keep learners and learning apart.

### Why Bad Things Happen To Good LMSs

"Training management" software was originally developed to keep track of traditional and formal learning in a rigidly defined way and with few custom options. With the advent of the web – and more recently with the rise of informal collaboration tools – vendors redefined their offerings as "learning management" platforms for "eLearning" – promising that their LMS tools would deliver and track all modes of training, and do so from any browser.

Unfortunately, that "browser-based" promise has been far from reality. Instead, LMSs still behave and look very much like their underlying proprietary software, which was designed for the professional learning administrator who regularly enters and manages training catalogs.

As a result, LMSs aren't designed for learners, who seek easy on-demand access to personalized planning tools, as well as meaningful knowledge and skill-building content.

### Problems Include:

- Inability to pinpoint appropriate courses or content within bulky, awkward digital catalogs;
- Inability to generate LMS log-in credentials - particularly for partners outside the firewall;
- Difficulty creating individual learning plans – or tracking progress to plan;
- Navigational and database roadblocks that hinder registration and enrollment;
- Inability to accept or correctly process online payments;
- A disjointed learner experience that forces navigation in and out of an LMS to complete or revisit required course content.

LMSs evolved from proprietary, enterprise-oriented software applications – not from websites or web-based applications. LMSs require that users identify themselves with pre-approved login credentials, whereas websites are typically designed for anonymous visitors or self-determined login information. The first LMSs weren't designed to handle anonymous visitors – much less allow a new user to create an individual account. Many LMSs still have functional limitations in this area today.

Why haven't these problems been resolved? Partly, because each learning organization tracks training in a unique way. Therefore, LMS companies are

## Portals Can Leverage Your LMS

The impact of underperforming, under-funded LMS systems, coupled with cuts to your organization's learning budget, means fewer partners and customers will receive the learning they need to sell more efficiently and effectively.

But you can shift this outcome in your favor – if you change the way your LMS delivers learning.

under constant pressure to develop their platforms in multiple directions to attract new licensees. What's more, over the years, dozens of developers – over 100 in total – have built LMSs that compete in a relatively small market that's sized to support only a handful of competitors profitably. The result is an LMS market of thinly capitalized and staffed survivors who spend much of their resources "chasing the next killer app," and too little time improving their tools for existing customers.

## The LMS/Portal Disconnect

Near the top of the list of neglected LMS improvements is learning portal functionality and interface design. LMS companies have struggled for years to incorporate into their offerings the level of collaborative and social learning sophistication that's now delivered in many Web 2.0 environments.

In addition, they've struggled to adapt and extend their systems to track and deliver training and performance measurements that can improve learning-related business decisions.

The few publicly-traded LMS companies are thinly traded and valued at just a few dollars per share. And both public and private vendors are considered to be ripe for acquisition. Given the industry's checkered history, there are few interested buyers – and capital infusions to fund significant product development are difficult to find, especially in today's financial environment.

So, what do these factors mean for corporate learning executives?

Bottom line - the impact of underperforming, under-funded LMS systems, coupled with cuts to your organization's learning budget, means fewer partners and customers will receive the learning they need to sell more efficiently and effectively. And unfortunately, that's happening precisely when you need to extend learning's reach more than ever!

But you can shift this outcome in your favor – if you change the way your LMS delivers learning.

## Learning 2.0 Portals – What Role Can They Play?

### First, Consider The Original Learning 1.0 Portal

Broadly defined, early-stage learning portals were websites where learners could research, buy or simply get access to training content.

A 2009 survey from Training Industry, Inc. revealed that 93% of learning managers offer a learning portal of some kind. These portals often include various formal and informal learning resources and tools – including online learning and self study content, communities-of-practice, blogs and more.

But almost 60% of learning managers plan either to upgrade or launch an entirely new portal in the next two years. Organizations often introduce new learning portals once they better understand a) the full potential of a quality portal site and b) the limitations of their early-stage portal implementations.

## Partners And Customers How Well Do You Serve These “Special Needs” Communities?

Customers and business partners typically have very different learning-related interests, requirements and priorities than internal employees.

For example, your partners’ marketing and sales people may need quick, easy access to very specific product information and instruction – but only on rare occasions. When it’s needed, fast, on-demand access to precisely the right information is essential. Otherwise, learners are likely to give up – and possibly jeopardize or abandon a related sales effort.

If your current portal requires multiple log-ins or lots of searching and enrollment for learning content, you’re likely losing some learners – and in the process, significant top-line revenue opportunities.

### Defining A Learning 2.0 Portal

For the purposes of this paper, we’ll use Bersin & Associates’ definition of a learning 2.0 portal:

- Leverages global training content in many forms,
- Changes worker expectation of when training information is available,
- Harnesses the power of collaborative learning (Web 2.0) to share knowledge among peers,
- Creates role-based context around the flood of learning content,
- Supports the talent management strategy,
- Frees you from the limitations of the enterprise LMS.

In contrast to first-generation sites, Learning 2.0 portals do not rely upon underlying LMS systems. 2.0 Portals leverage the latest standards-based web technology to provide a learning environment that’s more dynamic, complete and relevant for learners both inside and outside the corporate firewall.

Advanced 2.0 portals are designed from flexible, web-based modules that operate independently of the underlying systems architecture, making

them much faster and more cost-efficient to build, deploy, customize and maintain.

What’s more, their browser-driven interfaces can dramatically simplify the entire learning experience. They can provide a broader learner population with:

- Personalized development plans,
- Full e-commerce capability,
- Blended learning packaging and bundling,
- Simplified registration processes,
- Easy access to eLearning content,
- Real-time informal knowledge sharing capabilities,
- and other digital learning tools and resources.

And because much more learning behavior can be supported within this digital environment, it’s much easier to gather and report comprehensive learning performance metrics.

Ultimately, the value of a Learning 2.0 portal is its ability to reduce costs, speed time-to-learning and deliver training on-demand for global, enterprise-class organizations. The keys are an innovative, service-oriented architecture and a user-friendly web interface that makes the entire learning process more accessible from end-to-end.

## EMC Learning 2.0 Portal Strengthens Customer Relationships

For learners, nothing is more frustrating than reaching roadblocks when they try to research, find and register for appropriate courses. That was a key challenge facing EMC's VP of Education and Performance, Tom Clancy, and his team.

"We needed to provide customers and channel partners with an easier way to use and manage all aspects of their learning needs," Clancy said. "EMC had a robust LMS, but the user interface was difficult and not intuitive for prospective learners. And we found that it cost too much time and money to customize the LMS to make it more user friendly."

Clancy and his team found their answer in an Expertus SmartPortal™ solution. Now the company has a scalable solution that integrates with the enterprise LMS, corporate knowledge portals, HR Career Center portals, enterprise business applications, and other corporate intranets or portals.

Within only three months, the SmartPortal's benefits were clearly measurable. Across all three home pages on the company's learning site, traffic from customers, partners and guests increased dramatically.

Training purchases and credit card usage also experienced double-digit growth. And visitors who left the site after only visiting one page decreased by 20% - suggesting deeper relevance and satisfaction with the learner experience. At the same time, support costs were on-track to drop by 15%.

Moreover, Clancy said, "EMC's field sales organization now promotes the learning site – a far cry from the days when they actually steered people away from it."

### Big Numbers For EMC's Customer Learning

**50%+**

Increase in portal visits

**55%**

Increase in self-service registration

**30%**

Increase in sales on the learning portal

# Mapping a 2.0 Portal Strategy - A Marriage of 5 Elements

How can your organization develop a winning Learning 2.0 portal strategy? Follow these five steps to create a comprehensive plan of action:

- 1) Identify Who's Not Learning – And The Cost Of That Oversight
- 2) Define The Problem And Clarify The Solution Scope
- 3) Choose A Strong Portal Vendor
- 4) Implement For Success
- 5) Encourage Learner Adoption

## 1) Identify Who's Not Learning – And The Cost Of That Oversight

Creating a new learning portal (or transforming an existing portal) is a capital investment for most learning organizations. Therefore, you want stakeholder support for your proposal. As with any strategic initiative, you need to prepare a business case that quantifies expected ROI.

The following steps will help guide your business case development:

### a. Analyze Available Data

Review any existing training activity or performance reports that might indicate problems reaching your target learners. Are enrollments and completions lagging for any of your key constituencies? Examine year-over-year activity reports and compare numbers of learners

served vs. total population for each group. Are completion rates improving, remaining level, or declining? Do results vary across different groups – employees, partners, or customers?

### b. Query Stakeholders (see chart below)

Interview appropriate representatives from your learning communities (e.g. channel, customers). What problems do they say keep them from training their constituents? Assign each answer to one of two categories: i) Problems a 2.0 portal could solve, or ii) Problems a 2.0 portal is unlikely to resolve. Ask each stakeholder to estimate the organization's cost of an untrained employee. Then multiply that number by the number of all learning prospects who are not receiving needed training. Estimate these amounts for each stakeholder group. Sum these amounts to calculate a total annual opportunity cost of all missed training.

Your summed amount is only an estimate. However, your case is likely to be more persuasive if you have these numbers available to share with stakeholders, and can be clear about the process you used to determine the numbers.

### c. Benchmark Your ROI Estimate (See chart below)

When Tom Kelly ran Cisco's \$100-million Worldwide Training Operations Unit earlier this decade, he had to show at least a 5-to-1 ROI within 12-18 months for the capital investments he proposed. Learning 2.0 portal investments can vary in size depending on many factors, with six-figure outlays being common. Using Cisco's ROI rule of thumb, divide your sum from step 2 by 5. If the result is a six-figure dollar amount or more, it's a good indication that a 2.0 portal proposal for your organization aligns with industry benchmarks.

## Cost/Benefit Analysis is Key

As with any strategic initiative, you need to prepare a business case that quantifies expected ROI:

- Analyze Available Data
- Query Stakeholders
- Benchmark your ROI Estimate

## Estimate Lost Revenue from Untrained People

Following the directions in steps a, b, and c above, here is a simple form that you can fill out to quantify an annualized amount of estimated lost revenue from lack of training.

		Cost Per Untrained Learner*	# of Untrained Learners**	Cost of all Untrained Learners	Comments
1	Distribution Channel A	\$20,000	150	\$3,000,000	
2	Distribution Channel B				
3	Product A Customers	\$5,000	250	\$1,250,000	
4	Product B Customers				
5	Other Key Group				
	Totals				

\* Per estimates from you and stakeholders

\*\* Per LMS reports and stakeholder estimates

## 2) Define The Problem And Clarify The Solution Scope

How much of the problem are you going to solve? And how will you know that you're solving it?

In preparing a business case for your stakeholders to justify investment in a 2.0 portal, you'll want to set numeric goals for enrollments and completions across each learner segment. Explain to stakeholders that, while expecting to reach every available channel salesperson or customer, easier access to learning through a 2.0 portal will make it possible to reach many previously underserved learning prospects.

In the same way that you quantified lost revenue from lack of training, continue the math using the same per-person estimates to show the revenue that could be gained with new 2.0 portal completion rates. When deriving goals for enrollment and completion rates, draw from your own experience – including past results for completion of mandatory vs. elective courses.

New enrollment and completion rate goals should be established up front, and measured periodically on an ongoing basis, to verify progress. The standard reporting functionality in your LMS should provide tracking of key metrics, and you should be able to configure reports to show progress for each learner segment served.

## Quantify Top Line Revenue Due to Increased Training

Following the directions in step #2, here is a simple form that you can use to quantify an annualized amount of estimated revenue to be gained from reaching more learners in each key group.

		Cost Per Untrained Learner*	GOAL: # of Newly Trained Learner**	Top-Line Revenue-From Newly Trained Learner	Comments
1	Distribution Channel A	\$20,000	125	\$2.5 million	
2	Distribution Channel B				
3	Product A Customers	\$5,000	200	\$1,000,000	
4	Product B Customers				
5	Other Key Group				
	Totals				

\* From Step 1 chart, per estimates from you and stakeholders

\*\* With a 2.0 portal, the new enrollment and completion rate goal expressed as a number of learners (derived from Step 1 chart, per LMS reports and stakeholder estimates)

## 3) Choose A Strong Portal Vendor

Once you have quantified the need and made the business case for moving to a Learning 2.0 portal, you'll want to turn your attention to partnering with a company that can make your new portal a reality. Types of companies that provide portal design, development and implementation include:

- LMS Vendors
- Independent Software Vendors (ISVs)
- Learning Portal Specialists

Let's consider each of these options more closely.

### LMS Vendors

In recent years, most major LMS companies have recognized their limitations and have introduced some degree of portal functionality into their LMS offerings. While these portals have improved over time, using your LMS company's portal further ties you to its system architecture and LMS database structure (as well as the financial health of that LMS company).

This level of dependency can be a painful proposition, over time. If you know the features you want your LMS vendor to add to its offering, expect that list to grow rapidly as you add their portal functionality.

Critical shortcomings in portal solutions from LMS vendors include:

- Federated search capability-An LMS-driven portal provides search only on what it recognizes within its own data model. It will NOT search outside the LMS for other learning content or resources that are separate from its architecture.

## An effective learning portal allows for the following

- Scalable administration and reporting for commerce capabilities
- Tagging at user and content level
- Built for dynamic features like personalized learning maps, targeted calendars and messaging capabilities
- Seamlessly integrate and allow searches between formal and informal learning content
- Provides learners access to information beyond your LMS

b. e-Commerce models – While most LMS portals now offer e-commerce functionality, typically fewer options are offered. LMS portals typically cannot support your needs if, for example, your e-commerce requirements include various levels of administration and reporting (e.g. global, country, region, training unit), or items like tax calculation, global currency redemption and learning credits.

c. Flexibility to define additional metadata – LMSs typically offer only limited support for tagging at the user and content level within portals. This hinders or prevents many valuable “personalized” features, such as dynamic learning roadmaps, targeted learning calendars, and messaging capabilities.

d. Ability to integrate other information within the corporate infrastructure – directly or through links. In an LMS, only data that has been entered directly into the LMS is available. More powerful portals allow learners to seamlessly search and launch formal and informal learning that is often sourced from multiple back-end systems.

### Independent Software Vendors (ISVs)

You may have worked with an independent software vendor (ISV) in the past on a content or technology infrastructure project. That project may have worked reasonably well. You forged strong relationships. Now that ISV says its team is equipped to build and implement your 2.0 portal, as well.

This is not a wise choice.

Successful 2.0 portals require significant specialized understanding of corporate learning functions. You want to work with a team that has resolved learning-specific issues many times

before in an operational environment similar to yours. Furthermore, 2.0 portals require sophisticated knowledge of learning-specific IT infrastructures, as well as familiarity with popular learning platforms, tools that connect portals with enterprise systems and integrate components within a portal environment.

ISVs are always weak in one or more of these aspects. Therefore, choosing an ISV inevitably means spending part of the project teaching the team about your business, tools and processes. Unfortunately, by the time they understand your business, it's too late and too expensive to go back and build in all the functionality you need.

Given current economic conditions, managers are often asked to seek internal development resources before looking to outside vendors. If this is your situation, look for your organization's Microsoft Sharepoint administrator to self-servingly suggest using Sharepoint for your new portal. While good for content management and collaboration, Sharepoint is not specifically designed to support the sophisticated requirements of a global learning unit. Significant customization fees only partially close this gap. Be ready to politely ask your Sharepoint administrator for working examples of Sharepoint sites configured with your 2.0 portal specifications.

### Learning Portal Specialists

Some companies specialize in the design, development and implementation of Learning 2.0 portals as a core line of business. These firms have successfully delivered LMS-related implementations and learning portal solutions through the years for multiple clients.

Learning portal integration firms know how large

## Choosing The Perfect Portal Partner Look For These Strengths:

- Knows the ins and outs of corporate learning
- Proven usability expertise
- Informal/collaborative learning capabilities
- Federated search capability
- Enhanced measurement
- Sophisticated e-commerce options

training departments work, and they have deep experience with all facets of training functions that span organizational and geographic boundaries. This includes first-hand understanding of partner, supplier and customer learning requirements, and how to successfully weave these requirements into the finished 2.0 portal.

You should also expect proof of deep domain experience with all learning technologies, LMS platforms and related tools. In particular, look for proven work processes for integrating portals with disparate enterprise systems, applications and resources.

Learning portal specialists should be prepared to offer you a portal environment that emphasizes:

### a. Usability

If learners feel a portal is easy to use, they'll embrace it. Rapid user acceptance will drive the intended top-line revenues you need to prove your business case. Most software applications and websites describe themselves as "easy to use." However, the proof is in LMS reports. Specifically, if learner enrollment and completion rates improve, that's one indicator that a portal delivers on this promise.

### b. Informal and Collaborative Learning Capabilities

These tools enable learners to interact with others by sharing ideas, opinions, knowledge and experience. Capabilities such as discussion boards, wikis, ranking, referral mechanisms, whiteboards, and web-based conferencing make it possible to enrich "on demand" learning. This facilitates

interaction among portal community members and makes it possible for learners to leverage collective thinking and behaviors throughout the learning process.

### c. Federated Search

This functionality lets learners search beyond content that resides directly in the LMS. Depending on user access rights, this can include the ability to search intranets, extranets and the public web, as well as other company databases and content repositories.

### d. Sophisticated e-Commerce Options

There are many e-commerce solutions on the market today and they offer a broad range of functionality. Be sure the e-commerce capabilities used in your 2.0 portal fully meet all your requirements. If you need multiple levels of administration and reporting (e.g. global, country, region, training unit) and special features like tax calculation, global currency redemption and learning credits, a learning portal specialist company is better equipped to make it work seamlessly with your portal environment.

### e. Enhanced Measurement

This is the ability to monitor and measure portal traffic and visitor behaviors. For example, identifying content learners tend to view most and least, how long they view various pages, how they move through the site, and how often they abandon or complete registration or purchasing processes. With the increased traffic that tends to accompany a portal introduction, you and your colleagues will want to understand how learners are navigating the site and what is and is not contributing to increased revenues.

## How to Select the Right Learning Portal Specialist – A Checklist

Selection Criteria		Vendor A	Vendor B	Vendor C	Notes
1	Referenceable list of Learning 2.0 portal customers? What do those customers say?				
2	Off-the-shelf standard learning portal offering?				
3	Custom learning portal expertise?				
4	Learning operations experience? Understands how learning is managed with internal and external communities?				
5	Deep domain experience with popular LMS platforms and related learning tools?				
6	Established work processes for integrating disparate technologies into a cohesive 2.0 portal?				
7	Skilled at integrating informal and collaborative learning functionality into portal solutions?				
8	Federated search capability?				
9	Understands sophisticated e-commerce functionality?				
10	Proven know-how surrounding enhanced measurement and reporting in an enterprise-scale “web 2.0” environment?				

This checklist contains the key vendor selection criteria discussed in this paper. Use the checklist as a starting point for comparing portal vendor candidates. You may want to add criteria, and/or assign numeric “weights” to them, based upon their importance to your organization.

## Portal Project Checklist

- Build a Strong Project Team
- Round Out the Team
- Establish a Written Project Plan
- Generate a Use Case and Requirements
- Maintain Open Communication

## 4) Implement For Success

### Build A Strong Project Team

Once you've selected a vendor to create and implement your 2.0 portal, your attention must turn to identifying the people in your organization you'll need to breathe life into the portal. As with any other IT project, your team should include the project's primary sponsor and stakeholder, along with appropriate learning technology professionals from your staff.

### Round Out The Team

Don't forget the value of these players:

Those who manage your existing websites and portals – Gathering first-hand knowledge of current problems, shortcomings, technical and operational realities means you can fully and accurately consider their implications for your portal.

**Potential users** – If practical, it doesn't hurt to invite input from prospective users. This provides a useful reality check as you define requirements, and offers a path to user acceptance.

**The project 'visionary'** – This is usually a Director-level or higher manager who sees the business need for the 2.0 portal, reminds team members of the project's importance, and has clout to remove roadblocks to completion.

**An IT representative** – Look for a "process alignment" specialist who can coordinate needed IT resources so the project receives sufficient technical support.

**A marketing resource** – As discussed in the next

section of this paper, you'll want ongoing communications about the new portal shared with potential users and their internal contacts.

### Establish A Written Project Plan

Using Microsoft Project or another quality software tool, define the agreed-upon goals, objectives, staffing, budget, resources and timelines. Use the project plan to gain consensus about key responsibilities, milestones and deliverables.

### Generate A Use Case And Requirements

The best 2.0 portal implementations must be designed with user needs as their driving source of inspiration. Therefore, it's vital for the project plan to include a thorough, upfront user case for each of the learner segments you expect your portal to target.

If possible use a prototype portal development approach by mocking up one or more sample sites on paper, and ask users to offer feedback as they step through specific tasks. Use this intelligence to refine site processes, and then repeat the user prototype tests until significant issues have been resolved. The result is your initial 2.0 portal feature requirements list.

### Maintain Open Communication

Work the project plan with ongoing formal and informal communication among stakeholders and team members. The project leader should have a bias for action, along with management and technical skills to anticipate and avoid skill gaps, potential schedule delays and other issues.

As uncomfortable as it can be, the project manager must confront team members who are

## What Works in 2.0 Portals

New 2.0 portals need a marketing rollout not unlike the introduction of other new learning technology tools or websites. Again, rely on your “what works” experience from your organization’s other training initiatives to guide your strategies and tactics with the portal. Suggestions:

- Start early
- Incorporate a point event
- Maintain Momentum

not delivering on tasks and intervene with project sponsors or stakeholders to correct any problems along the way.

### 5) Encourage Learner Adoption

**Lead learners to your new 2.0 portal and make it easy to drink**

As portal production nears completion, it’s critical to begin spreading the word among the portal’s community, both inside and outside of your organization. It’s not as easy as sending a single broadcast email message, announcing that you’ve “flipped the switch” on a new application. Especially if you’re reaching out to previously untouched learners, you’ll need a more comprehensive, sustained marketing communications program to drive awareness, interest and action.

New 2.0 portals need a marketing rollout plan not unlike the introduction of other new learning technology tools or websites. Again, rely on your “what works” experience from your organization’s other training initiatives to guide your portal promotion strategies and tactics.

Some ideas to consider:

#### a. Start Early

Don’t wait until the portal goes live to initiate your marketing outreach. As the front-end of the portal starts to take shape, issue a short series of pre-release ‘portal-in-development’ emails that show screen shots and build learner interest. Tailor these communications for internal, partner and customer segments, selling portal benefits

that are unique or most appealing to each audience.

#### b. Incorporate a “point event”

When all stakeholders have signed off on the completed portal, organize a launch time period and conduct several events and communications to further raise learner mindshare. Think about hosting a ‘New Portal Week’ promotion, where all learners that register and/or log-in during that interval receive a special premium or incentive.

If practical, host an in-person launch party that includes demonstrations, hand-on trials and user training. Create video tutorials and simple, one-page PDF-based “quick reference” guides. Distribute materials broadly so that first-time portal users enjoy a productive, satisfying introduction.

#### c. Maintain Momentum

No doubt, you’ll be closely monitoring traffic volumes, content usage patterns and conversion rates – along with related training enrollment and completion rates. And you’ll be comparing them to prior statistics. Use this intelligence to inform your marketing outreach, by focusing messages around issues and opportunities revealed in the data.

And when metrics demonstrate success – don’t be shy about quantifying and communicating that success! Make your own day by showcasing significant increases in 2.0 portal traffic, and anecdotal quotes (in writing or on video) from satisfied first-time portal users. The possibilities are limitless. Just remember to keep the flow of information visible, as a reminder that learning 2.0 is always “on”!

## Next Steps:

- [Request a Learning 2.0 Portal “Readiness Assessment”](#)
- [Or Attend a Portal Workshop](#)

Are you still on the fence about portal-based learning?

Or do you already train customers and partners through a traditional LMS-based portal?

Regardless, we can help you determine what’s working and what’s not within your existing environment – and help you determine the best path to a more viable next-generation solution.

Contact us to schedule a personalized Learning 2.0 Portal “[Readiness Assessment](#).”

Or, ask about one of our [Portal Evaluation Workshops](#), where you can learn more about how to improve the impact of your portal-driven learning capabilities.

Our Learning 2.0 Specialists are happy to guide you through the portal evaluation process:

Phone: 877-827-8160

Email: [info@expertus.com](mailto:info@expertus.com)

Online: [www.expertus.com](http://www.expertus.com)

## About the Author

Mohana Radhakrishnan is Vice President of Client Services for Expertus, a learning services firm with over 500 learning specialists who help companies like Cisco, ADP and Lockheed Martin optimize every aspect of their learning organizations. For more than 10 years, Mohana has been designing and delivering robust learning processes, and has been named among Training Industry Inc.’s Top 20 Most Influential Training Professionals. She can be reached via email at [mohanark@expertus.com](mailto:mohanark@expertus.com)



### Corporate Headquarters

Expertus Inc  
2091 Landings Drive  
Mountain View, CA 94043

Telephone: 650-691-1440

Toll Free: 877-827-8160

Fax: 650-691-1287

Email: [info@expertus.com](mailto:info@expertus.com)

### Sales

[sales@expertus.com](mailto:sales@expertus.com)

### Public Relations

[press@expertus.com](mailto:press@expertus.com)

### Product Support

[support@expertus.com](mailto:support@expertus.com)