

IBM's learning transformation story.



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Introduction

For IBM, learning is a strategic enabler of change—an indispensable tool that supports new initiatives, re-skills our workforce and prepares us to address key market shifts and organizational transformations, such as those associated with the rapidly approaching on demand era.

The fact that IBM spends about US\$750 million annually for learning initiatives represents a firm commitment to the belief that learning enhances productivity, enables development of employee potential, empowers employees and teams to innovate, and extends organizational knowledge to suppliers, partners and clients.

Through a continual process of learning transformation, IBM has established leadership in learning, as defined and measured by business values, that is, how learning directly enables IBM's businesses to win and grow in the competitive marketplace.

The results are compelling:²

Learning anywhere, anytime and on demand—Employees spend an estimated 17 million hours each year (about 55 hours per employee) in formal training—either online, through online learning activities or in a traditional classroom. Approximately 47 percent of IBM learning days are now conducted online anywhere, anytime.³

Dedicated and talented workforce—IBM studies have linked learning with employee retention. They have concluded that, when given meaningful learning and developmental opportunities, 79 percent of IBM employees are likely to stay with the company for at least three years.⁴

The bottom line

IBM conducts almost half of all employee training via e-learning, realizing a cost avoidance of US\$579 million over the past two years.⁵



A blended learning approach optimizes the return on IBM's training investments. The introduction of a blended learning approach has saved US\$24 million annually in deployment costs of IBM's new-manager training program, Basic Blue, with five times as much content as delivered by the previous new-manager program.⁶

IBM's Role of the Manager program helped 30,000 managers, leaders and executives in 70 countries to acquire additional leadership expertise, effectively lead remote and mobile teams, and create an environment that encourages continual innovation and creativity.

Over one-third of IBM's employees use the IBM Signature Selling Method every day as they develop solutions to client problems. IBM has learned that the professionals who have trained on and use this method sell two to three times more than sales personnel who have not. The method is supported by a portal to allow IBM sales representatives to hone their selling skills and to help with soft-skills development, such as self-image and rapport-building, that is necessary for sales success.⁷

IBM's vision of learning—an investment in the future

For nearly 90 years, learning has played a key role in enabling IBM's success. Based on a coordinated and aligned approach, IBM has fostered and consistently maintained the highest quality learning programs for employee, managerial and executive development.

In 1915, only four years after IBM was incorporated, a separate and distinct IBM education department was established to train and develop employees. Shortly thereafter, in 1916, IBM's education program was formally started to instruct employees on the use of the company's product line.

Learning started in the early days of IBM's history and will continue into its future. In 1918 the first formal customer education was offered; in 1921 an IBM Management Development Program was begun; in 1929 customer training was instituted. Responding to customer requests, the IBM Customer Education Program was launched in 1936.



Throughout the years, IBM continued to invest in its learning tradition through a commitment to outreach initiatives and innovation. In the 1990s, IBM transformed itself from a hardware company to a services-driven organization. This change required rebuilding and re-skilling our employee base. Learning played a critical role in helping to align employees around new business models in order to capture business opportunities in the marketplace. This ongoing commitment to succeed—by harnessing the power of learning to develop its employees—has enabled IBM to maintain the highest learning standards in the business world.

Simply put: learning is considered an investment in IBM's future for our employees, suppliers, IBM Business Partners and clients.

Implementing state-of-the-art learning at IBM

Recently IBM has been focusing on developing core and job-specific competencies and skills. Core competencies are those fundamental behaviors that every IBM professional needs to achieve. Job-related competencies are those behaviors required for employees to excel at their jobs. To maximize business effectiveness for job-related competencies, five strategic sectors have been targeted for significant learning transformation: sales, leadership and management, employee development, IT training and training to support business partnerships.

Learning transformation evolved from the recognition that throughout most of IBM's history the primary instructional method has been based on time-consuming, face-to-face interactions. This might involve a week or more of training per year per employee. Managers told employees what classes to attend. But as a significant segment of the employee population began to shift from one opportunity to the next, managers were forced to think about how to more significantly motivate and engage a valuable workforce. Teaching the workforce new competencies within limited time schedules became highly problematic.

IBM targets five strategic sectors to maximize the business effectiveness of its training.

A focus on face-to-face classroom learning had become overly costly.



Organizations across IBM business units participate in learning governance.

Six principles ensure maximum effectiveness.

Consequently, the goal became to find a way to deliver information and training, at all levels, in a practical, meaningful and realistic way. And the success of those programs needed to be measured not simply through learner satisfaction, but by how well this learning would be applied and how effectively this learning would drive business performance.

Learning governance

IBM's learning governance model enables the business to pursue the design and development of the most critical enterprisewide learning priorities. Learning organizations across the business participate in the process of determining such priorities, and the respective executives are involved to ensure agreement on the list of enterprisewide priorities to be pursued. This agreement has led to an official enterprisewide sanction and funding.

IBM's learning governance model is structured to ensure maximum effectiveness for our learning investment. We use our governance to ensure adherence to the following principles:

- Align with IBM business so that in every learning intervention IBM strategy is integrated and implemented
- Manage enterprisewide corporate learning investment, allocation and spending at a high level
- Exercise a disciplined project approach to enterprisewide learning
- Demonstrate a measurable level of effectiveness and return on IBM's learning investment
- Ensure the use of best-of-breed learning methodologies, practices and design approaches
- Ensure cost-efficiency and effectiveness of learning delivery.



The IBM Learning Investment Council ensures learning meets the business units' requirements.

The Learning Management Council guides the next phase of learning transformation and planning at IBM.

The blended learning system combines Web-based, interactive, collaborative and face-to-face learning.

The IBM Learning Investment Council is made up of representatives from each business unit to establish the prioritization of projects and funding. They are also responsible for ensuring that learning is addressing the needs and requirements of the businesses, including:

- Setting enterprisewide initiative criteria
- · Determining the enterprisewide priority initiatives
- · Determining and confirming investment allocation on a project basis
- · Monitoring progress and spending.

The Learning Management Council was established to help guide the next phase of IBM's learning transformation and to provide the guidance and controls necessary to implement the strategic learning plans and portfolio. This is a separate group from the Learning Investment Council and is composed of business unit and geography representatives. Learning Management Council responsibilities include:

- Setting rules on how we manage all of learning in IBM
- Defining principles of operation
- · Defining standards for learning design
- · Defining vision and strategy for learning systems
- Discussing and resolving issues brought forward by learning leadership teams
- Exchanging information.

Blending for success

IBM rose to the challenge of a constantly changing business environment by developing and deploying a blended learning approach. Based, in part, on the principle that people learn in different ways, this methodology uses four distinct educational approaches, in conjunction with one another, and enables members of an organization to grow via an optimal learning experience, and to become more productive and create value for the company.

More specifically, the blended learning system combines Web-based, interactive, collaborative and face-to-face learning, and utilizes the best medium for the level of learning required. It also creates a structure that orchestrates movement from one learning experience to the next so that each approach reinforces and builds upon the last.



The four blended learning approaches include:

Learning from information—Performance support and reference materials are frequently used as a starting point. They tend to be Web-based and take advantage of online information transfer. This allows a person to access only the materials that are relevant to his or her job function or business needs. Allowing the learner to move at his or her own pace maximizes interest and motivation and empowers the user to learn quickly and comprehensively.

Learning from interaction, simulation or games—Typically multimedia-driven, this type of learning enables a student to focus on practicing with real-life scenarios, online. Utilizing information learned during the prior approach, it is self-directed and involves specific modules, interactive games, coaching and layered simulations. These practice cases provide a multitude of response choices that help learners master specifically relevant competencies at their own pace.

Collaborative learning—This approach allows participants to work with peers in virtual classrooms, e-labs and collaborative sessions to build realtime awareness with live, online conferences and teaming. It is typically threaded—meaning there is an expert who posts the scenarios and continually focuses the discussions.

Classroom-based learning—Face-to-face discussions of lessons learned complement and supplement the three earlier approaches. This approach includes learning labs, classroom sessions, mentoring, role-playing, coaching, access to subject matter experts and detailed examination of actual case studies.



Learning initiatives

Specific IBM learning initiatives that use the blended learning system originated from, and are directly aligned with, the emergence or anticipation of business needs. Each of them is constructed to transform and adapt to changing business environments.

IBM's employee development transformation

Employee development furthers both employee and corporate needs.

If employees are able to quickly and effectively satisfy client needs as a result of their companywide skills enhancement, organizational revenues will grow. Furthermore, organizations that provide career-expanding incentives for productive staff to remain with the company save human resource and retraining costs.

Foundational competencies

In 2001, IBM learning began an ambitious two-year effort to define and implement a core set of competencies that would enable employees to make effective development choices, maximize their learning time and achieve their business goals—goals that support the company's strategy and direction.

Thousands of top-performing IBM employees identified nine core competencies they thought were most critical to top performance, and in December 2003 these fundamental competencies were announced to all employees. A single, focused development curriculum was provided to help employees master the competencies, and hundreds of learning solutions were created or revamped, leveraging a variety of formats.

A focused development curriculum helps employees master fundamental competencies.

By placing an emphasis on validated skills, alignment to strategy, personalized development and consistency of experience, the foundational competencies have quickly become the cornerstone of people development transformation within IBM.



Blended learning enables success in an employee's first year at IBM.

A variety of learning activities helps

set skill development in motion.

"On-boarding" and assimilation of new employees

Recognizing that providing a smooth "on-boarding" experience is a financially wise, critical foundation for long-term human resource retention and development, IBM created a new employee learning program called IBM Connections. The goal of this learning empowerment program is to bring new hires to class for collaboration and networking, rather than having them gather for a less-than-engaging lecture. This yearlong learning continuum provides a blended e-learning program to new employees, in order to maximize employees' success in their first year.

In the first two to three months, e-learning modules offer basic information about the organization, help new employees complete administrative tasks related to working at the company and give insight into the organization and how it functions. Then a half-day of training explores employees' past successes and frustrations, and helps them develop strategies and action plans for success.

Other unique components include executive communications, manager/ employee conferences, change-management discussions, follow-up planning sessions, and on-the-job coaching and mentoring support. These learning activities help to set employee skill development in motion, cultivate initiative and harness efforts to the corporate mission.

Individual development planning

It's not enough to simply train an employee. Crafted individual learning activities designed to focus on an employee's development ensure company loyalty and motivate employees toward greater productivity. This is the objective of IBM's Individual Development Planning (IDP) program—employees define career goals and aspirations, including activities that enable them to grow toward those goals and meet those career opportunities.



Employees are better able to reach their goals through the use of focused, individual learning activities. responsibilities so they can then determine appropriate learning activities to achieve their performance objectives. Employees also review corporate and business unit strategies to understand how their roles contribute to those strategies. Manager-employee discussions may lead to suggested learning activities, such as Web-based instruction and information, computer-based training, mentoring with a more experienced employee, shadowing activities to learn about different roles and business areas, work assignments to apply learning or increase experience, and team-based activities to gain insights from collaboration.

The IDP process begins by focusing employees on their current roles and

Employees also access a Web-based personal skills assessment tool that gives them a benchmark of what skills and skill levels they should have for their current positions and for their future career goals.

Sales transformation

Sales skill transformation is a critical priority in the on demand era.

In the on demand business world, sales challenges include more than simply being up-to-date on the latest product advances, new market opportunities and sales techniques. The challenges of the on demand business world entail being savvy about innovative ways to build relationships with company leaders—and to meet client needs with integrated, customized solutions.

For these reasons, IBM has prioritized sales skills transformation as a critical initiative. It has had a major impact on the quality of IBM services and solutions. This program was based on three objectives:

- Build trusted advisor relationships with key, senior client line-of-business executives and company leaders
- Improve the industry expertise of our sellers and consultants to effectively sell and deliver IBM's integrated industry solutions to our clients
- Address our clients' problems and concerns with integrated and tailored industry solutions.



C-suite success workshops are geared toward contacting C-level, client and line-of-business executives and building relationships with them.

IBM portals enable sales skills transformation.

Basic Blue was IBM's first blended learning initiative.

In the case of the first objective, IBM developed the C-suite success workshops, which are geared toward not just contacting but also building relationships with C-level, client and line-of-business executives. The workshops bring together senior IBM relationship leaders with three C-level executives from various industries.

To address the second and third objectives, IBM developed workshops to help the salesforce and technical community gain a better understanding of IBM's business solutions, articulate their value to clients and develop a conceptual design of specific solutions.

A comprehensive e-learning curriculum was made available through the IBM sales learning portal called sales compass. This environment provides the sales audience with a vast array of personalized and role-based learning paths—as well as on demand learning modules on sales methodology, industry insight and customer business value. In addition, a collaborative sales community portal provides easy access to experiential industry knowledge and expertise.

The sales compass learning center has become the one-stop shop for point-of-need sales learning—and the learning is presented in the context of specific challenges that a sales professional might encounter. The IBM Signature Selling Methodology provides common terminology and process steps—to present the sales professional with relevant structured learning, tools and knowledge.

Tangible business results demonstrate the value of this blended learning solution – both in terms of increased productivity and top-line revenue.

Management and leadership development

Basic Blue — new-manager development

In 1999, IBM launched Basic Blue for Managers. It has been used as the core training program for new managers worldwide and is a comprehensive, enterprisewide example of IBM's first blended learning initiative. It has had a profound impact throughout the IBM corporation and throughout the learning industry. Several fundamental learning models and practices launched as part of this initiative have been leveraged for other programs in IBM.



Basic Blue employs three phases for management and leadership development.

A blended learning approach has helped the Basic Blue program achieve demonstrable success. The Basic Blue program helps new managers build skills that are necessary to promote change, align behavior with new corporate strategies, reduce bureaucracy, emphasize customer focus and inspire the highest employee performance.

Basic Blue is a three-phase approach to management and leadership development. This learning solution for new IBM managers offers the optimum blend of learning methods through its three phases:

Phase I—The purpose of Phase I is to immediately bring critical management/ leadership information to the new IBM manager via a combination of e-learning, simulations, in-field experiences and second-line coaching.

Phase II—In this phase, employees increase management and leadership skills and build upon the knowledge gained in Phase I through a five-day, face-to-face, experience-based workshop.

Phase III—Employees continue via e-learning and on-the-job training, similar to Phase I, to apply concepts that have been learned. Participants have the opportunity to collaborate with peer managers while practicing and reinforcing skills by applying them on the job.

Since its inception, Basic Blue has won numerous industry awards and has had a profound impact on learning at IBM. For example:

- Studies conducted by Harvard Business School and other organizations determined that Basic Blue enables managers to learn five times as much material at one-third of the cost of a classroom-only approach.⁸
- Based on 5,000 new managers per year and a program cost of US\$5 million, a cost avoidance of US\$88 million has been achieved since the program was launched in 1999 (includes all program costs, travel, living expenses and manager time).



This learning initiative addresses management's role from an on demand perspective.

that their best employees constantly have the opportunity to grow and make a difference in the business. This means building basic behaviors, such as remaining connected with peer managers within their business unit to share solutions and building networks, as well as defining and executing actions that create business results. This is why IBM developed a learning program that addresses the management role from an on demand perspective. To date, this two-year initiative has been the largest transformational management development initiative in the history of IBM. It touches 30,000 executives, leaders and managers at IBM across all business units and geographies.

Managers need to be able to look for ways to develop their full potential so

In less than a year, the Role of the Manager at IBM program has:9

Role of the manager at IBM — management development transformation

- Served as a catalyst for IBM's managers to create and sustain new momentum to achieve and exceed revenue goals for the year
- Helped produce a net return of more than US\$20 million in less than one year in just one of nine IBM business units
- Improved manager effectiveness, to drive increased employee engagement and morale, increase achievement of IBM's strategic objectives and increase collaboration and communication among brands and teams.

Managers identify and address pressing issues by business unit and then formulate action plans with targeted strategies and goals. The Role of the Manager at IBM is a companywide, blended learning program designed to focus managers on identifying and addressing pressing business issues by business unit—and then to formulate action plans with targeted strategies and goals. It leverages e-learning, in-person learning, management communities and the full capabilities of the IBM intranet. It has enterprise-wide elements, as well as elements customized to each business group, and operates in five phases:

Phase I: Customized requirements by business unit—Each business unit is exposed to customized requirements based on industry and location. Online labs, each with its own unique actions, facilitate the process of learning.



There are five phases in the Role of the Manager program.

Phase II: ManagerJam—New technology and learning methods are used to gather input on key leadership issues and allow key executives to dialogue or jam with each other online. The discussion is focused and directed, and develops a team approach to resolving issues defined by the unit.

Phase III: Edvisor—This is a Web-based, online tool developed to support continuous learning for all managers, including those in nontraditional office situations, and remote and mobile workers. Edvisor has three components: exploring Web-based learning, preparing for the role of manager and formulating an individual development plan.

Phase IV: The in-class learning lab-This phase comprises two days that focus on experiential, higher-order learning, personal networking and action learning.

Phase V: Manager ongoing dialogue—An online, shared e-space provides a means for the same group of managers to collaborate on their chosen management action challenges.

IBM technical training

In 2003, IDC ranked IBM as the world's largest IT training provider. IBM develops comprehensive, flexible portfolios of technical training and education services designed to enable its IT professionals to acquire, maintain and optimize mission-critical IT skills.

Roadmaps for technical training encompass many key elements.

IBM technical employees, as well as technical employees from our clients, partners and suppliers, can plan their skills development or certification via technical roadmaps. These roadmaps include opportunities for classroom and blended learning. For example, a roadmap may include the following elements:

- Online courses (some with online labs)
- · Reference books or certification preparation guides
- Online pretests
- · Self-paced virtual classes
- · Mentoring
- Boot camps (including self-paced, pre-study and certification exams)
- Advanced classroom-based, instructor-led offerings.



Through the IBM Global Campus, an internal learning portal, employees can search the worldwide IBM course catalog, enroll in e-learning or classroom courses, and start e-learning courses.

IBM continuously invests to upgrade the technical skills and expertise of its employees. In hot skill areas alone—including Linux, wireless and business integration—IBM is targeting US\$200 million to build the expertise of more than 100,000 employees in 2004.¹⁰

IBM intranet

IBM's intranet is the primary vehicle for providing business-critical information to employees. With an average of 2.4 million pages viewed per business day, it has become the number-one trusted source for employee information. In addition to providing up-to-the-minute organizational and industry news, the intranet home page provides customized information to employees based on their job roles, responsibilities and areas of interest.

There are processes that alert the IBM staff to shifts in the industry and customer requirements and processes that educate and communicate changes, as well as information to address new requirements and shifts. IBM has extensive online networks where experts share insights and best practices in realtime, allowing a broadening of the scope of response, but also enabling efficient responsiveness. Announcements can be rolled out across the organization immediately, and a training module can be developed within an hour.

IBM's collaborative teaming solutions provide the ability to share business-critical information to groups of IBM employees who are working on a common project. Many of the largest account teams that support the leading global clients operate in a virtual collaborative space. This ensures that all IBM employees, no matter where they are in the world, have accurate and timely information that

they use to work together virtually and to respond to critical customer issues.

The IBM intranet home page provides customized information to employees.

Collaborative teaming solutions provide the ability to share business-critical information to groups of IBM employees who are working on a common project.



IBM offers training roadmaps to 90,000 IBM Business Partners.

IBM PartnerWorld University is designed to enhance Business Partners' e-business knowledge. And as the culture of learning is transformed, IBM is dedicated to continually expanding and overhauling its existing programs. Establishing new models based on our learning experiences in the field enables IBM's business leaders to better serve their clients by sharing those experiences and helping their clients maximize their growth potential.

IBM PartnerWorld initiative

In February 2003, IBM renewed its long-standing commitment to facilitating the success of IBM Business Partners by announcing a new initiative designed to enable its network of 90,000 Partners to deliver e-business on demand™ solutions to clients of all sizes.

To enable the success of its Business Partners, IBM launched a training and certification initiative to help Business Partners develop individual and/or companywide skill plans to support their business strategies. Partners can develop and use skill profiles to assess their companies' skills and then use the skill roadmaps to develop individual skill plans. Competency roadmaps were developed for these five areas:

- Marketing
- Sales
- · Solution design
- Application development
- Business management.

To support this effort, IBM launched PartnerWorld® University as one of IBM's key skill-building offerings designed to enhance Business Partners' knowledge of e-business and to help them better leverage their participation in IBM PartnerWorld activities. This no-cost, online education resource provides easy access to a wide variety of lectures—available around the clock. Courses are delivered using the Web-lecture format with slide show and audio technology. Lectures can be viewed online or downloaded for later viewing.



IBM's learning strategy is designed to meet the needs of the future.

The business world of the future will require just-in-time learning.

The learning archetype for the on demand business environment must be rethought and reinvented.

IBM's vision for learning

Learning that supports the ongoing transformation process is a core vision at IBM—even more crucial in today's business environment. IBM's goal is to create an environment where it is easy for employees to learn what they need, when they need it, and to apply their knowledge, understanding and experience for their own benefit as well as IBM's. To achieve this objective, IBM's learning strategy is to:

- Invest in strategic learning initiatives that have the highest impact on business results as measured by business results and personal outcomes
- Leverage the intellectual capital of IBM employees, through collaboration, to grow the knowledge base
- Advance learning design to provide effective and robust learning experiences that speed the transfer of knowledge to employees, Business Partners and clients to solve business problems faster
- Enable pervasive learning systems to ensure that learning solutions reach the target audience and meet their needs in order to achieve the desired results.

But to respond to the business world of the future—one that's in flux due to a complex convergence of rapidly changing markets, emerging technologies and new workforce demographics—companies will need to accelerate their transformation and be more innovative than the competition on an ongoing basis. They'll need to respond to a world where information, solutions and results are on demand. They'll require the ability to access just enough information and just the right information, just in time for particular needs.

While traditional teaching avenues (classrooms, lectures and manuals) continue to provide value for individual, team and organizational learning, the marketplace continues to evolve very rapidly. The need to quickly address the changing requirements of clients and the enterprise requires a different approach. As these transformational and innovative business needs



are increasingly driven by an on demand age, learning can no longer remain focused solely on individual productivity. The learning archetype for the on demand business environment must be rethought and reinvented:

- Learners must be empowered to shape, rather than just passively receive, their learning experiences
- Opportunities to learn must become embedded in process workflows, enabling learning while doing
- The focus of learning must extend beyond learners as individuals to include learners as teams and organizations
- Learning must become a key vehicle to enhance relationships across the enterprise and its entire value chain.

Conclusion

Today's business world cannot operate on yesterday's models.

To ensure competitive advantage, maximize revenues and minimize risk, companies must provide and embrace innovative learning. Meeting the enormous demands of a fast-changing, 21st-century marketplace requires the ability to rapidly access relevant resources and leverage advanced skills to address new market opportunities and deliver customized solutions to clients—all with the speed of a keystroke. To ensure the highest level of competitive advantage, maximize revenues and minimize risk, companies must provide and embrace—across the entire organization—the kind of innovative learning that will facilitate meeting these powerful challenges.

IBM is allocating approximately US\$750 million annually to develop and institute the highest level of learning capabilities for all of its employees.

Embracing these business fundamentals, IBM is allocating approximately US\$750 million annually to develop and institute the highest level of learning capabilities for all its employees—from new employees to executives, from electrical engineers and software programmers to sales professionals. As part of its ongoing legacy of transformational learning, new program archetypes that target these on demand business requirements are not only being created and implemented, but are already yielding significant, bottom-line results for both IBM and its Business Partners.

But this is just the beginning.



The next step for IBM is the implementation of an employee portal environment—an on demand workplace for its 320,000 employees.

In an increasingly on demand business environment, learning will continue to be a critical enabler of change at IBM. The focus on growth and innovation for our business will require an ongoing alignment of our learning initiatives to business priorities. It will also require that we implement cutting-edge design and delivery approaches along with the application of new technologies to learning, so that we can enhance the productivity of our increasingly mobile and flexible workforce. And it will require that we orchestrate the change through a governance model that ensures consistency when needed, while providing appropriate levels of autonomy.

The next step for IBM is the implementation of an on demand workplace for its 320,000 employees. This employee portal environment will integrate mainstream applications with relevant learning for key client-facing roles. This will enable IBM employees to learn more seamlessly while working. It will also require a culture that continues to promote ways for our employees to be both consumers and creators of learning and knowledge, enhancing the learning culture that drives organizational performance.

For IBM, learning is embedded in our DNA. It is essential to IBM's success today and into the future. IBM will continue to invest in effective learning programs that deliver business value, while at the same time driving innovations in learning to advance the learning industry.

For more information

For more information about IBM Global Services, contact your IBM sales representative or visit:

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