

**Change, Challenges, Champions, & Culture: An Analysis of the Strategic Foundation  
for Sustaining Distance Training within an Organization**

**Lealan M. Zaccone**

University of Maryland University College  
OMDE 621 Sec 9040

## **Abstract**

Several studies highlighting best practices in the field of distance training suggest that strategic planning is the key factor in achieving a much greater likelihood for success in sustaining distance training programs. Although it is necessary for an organization to address issues of technology and learning effectiveness, it is equally important for an organization to address issues surrounding organizational leadership, culture, infrastructure and change. Building a strategic foundation includes: developing a learning architecture that coordinates elearning with the rest of the organization's learning efforts, reviewing an infrastructure that uses the organization's existing technological capabilities to design and deliver elearning, providing leadership support across all levels of the enterprise, overcoming barriers by implementing an effective change management strategy, and developing a sound business and communication plan that includes elearning as part of the organizational culture. The more pieces in this foundation that support the elearning initiative, the more likely the initiative will be sustained (Rosenberg, 2001, p.33). This paper discusses that foundation in greater detail and outlines the most common challenges associated with sustaining distance training programs. It identifies the key issues impacting organizational planning and highlights several possible solutions used to implement and maintain distance training programs. Rationale is supported and referenced through various research and literature in the field of distance training.

## **Change, Challenges, Champions, & Culture: An Analysis of the Strategic Foundation for Sustaining Distance Training within an Organization**

The adoption of elearning is the result of a well thought out business plan that involves the continuous effort of linking together leadership support, organizational culture, strategic planning and change management. The following analysis presents a theoretical framework for sustaining distance training programs and highlights the processes, people, competencies and resources needed to adequately implement, deliver, support and sustain distance training programs.

### **The Strategic Framework for Sustaining Distance Training**

According to several case studies tracking the progress of why elearning projects fail, too often organizations invest in new technologies only to find out that their existing culture will not support them. These studies illustrate that given a negative learning culture and a quality elearning initiative, the culture almost always wins and without the support of senior management engaged in the process, the elearning initiative may never get off the ground (Rosenberg, 2001, p. 33). By assessing organizational culture prior to the implementation of elearning, an organization can carry out and design a strategy that is tailored to the organization's individual needs. Below are several questions to address in that process:

1. The organizational definition of learning: How does the organization view the role of learning?
2. The individual(s) responsible for employee development and learning: Who are they-manager, the organization, or the employee?
3. The process: How learning is currently managed and organized?

4. The justification of learning: How is it measured and valued (attendance, certification, test scores, work performance, etc?)
5. What is the organizations current infrastructure and experience with technology-delivered or enabled learning? (Cross & Dublin, 2002, p. 33).

Berge (2001) suggests that in order for a distance training initiative to become part of an organization's learning culture, there must be an integration of project/program management, change management, and strategic planning ...sustained efforts usually require a cultural change driven by mission-critical needs and opportunities (p. 354). Distance training programs can enhance existing training programs but the training initiative must be tied to the organization's overall needs, mission, vision, and goals. The first step is to fully analyze the current situation as it pertains to the ability to launch and sustain elearning. According to Berge (2001) for planning to begin at the organizational level, an organization must consider its mission and identify any unmet needs between where it is and where it wants to be. It is good to review the recent history and current culture of the organization first, and then determine organizational needs by listing current strengths (programs, trainers, financial, marketing, etc) as well as weaknesses of what works and what doesn't work (p.149). Other research suggests that a quality assessment provides the data that is required for identifying training needs, markets, industry trends, competitive advantage, solution planning, cost-benefit information, system design, system use and expansion, and an assessment measure also helps ensure that the initiative reflects the culture of the organization and aligns with key business goals (Chute, Thompson, & Hancock, 1999, p. 72). The training plan should be concrete, with a detailed vision statement, and goals identified for action

over the next three to five years (adjusted and revised whenever necessary) and the action steps or implementation strategies should be measurable or easily recognizable deliverables or outcomes, all clearly specified (Bates, 2000, p. 56). Berge (2001) concurs that in order to increase an organization to the highest level of maturity includes a cultural change where distance training is institutionalized in the organization and characterized by policy, communication, and practices that are aligned with business objectives. When an organization reaches this level of maturity, the business unit has established a distance training identify and conducts systematic assessment of training events from an organizational perspective (p. 16).

### **Strategic Planning**

Strategic planning is a complex and ongoing process of organizational change that helps an organization look at their training initiative in an objective and critical manner. It serves as an operational tool for the organization to define their present infrastructure as well as future possibilities, and acts as a communication tool to help the organization justify the resources needed to enhance the success of their programs. Overall, strategic planning highlights an understanding of: (1) business readiness; (2) the nature of the learning environment; (3) the value of instructional and information design; (4) change management; (5) reinventing a training organization; (6) the elearning industry; and (7) leadership commitment (Rosenberg, 2001, p. 32). Other benefits of strategic planning include a better understanding of the program management, a higher level of communication & participation among stakeholders, and a model for better decision making. It also allows for systematic deployment (Berge, 2001, p. 149).

Strategic planning is oriented toward the future and looks at how the organization could differ in 5-10 years. It aims at creating the future based on an analysis of foreseen or predicted trends, as well as, an analysis of internal and external environments. The strategic data establishes a context for accomplishing goals and provides a framework to achieve them. It allows an organization to respond to the emerging trends, events, challenges, and opportunities that align with their vision and mission, and aims at changing the way an organization thinks and operates. When successful, it influences in all areas of operation, becoming part of the organization's philosophy and culture. (Lerner, 1999, para. 53).

Although every planning process is uniquely tailored to fit the specific needs of a particular organization, according to several best case studies as provided by Berge (2001), successful models include the following steps: 1.) Integrating actions with the organizational mission and vision; 2.) Following guiding beliefs and principles, 3.) Using external environmental scans, and 4.) Using internal organizational strengths. (p. 23). The table below illustrates the criteria a company should address in developing a strategic plan.

**Table 1** Steps in the Strategic Planning Process

<b>AN ORGANIZATIONAL PLANNING MODEL</b>	
<p><i>Step 1: Analyze- assessing the culture</i></p> <p><b>Perform Strategic Analysis:</b> In this step everything is under analysis: current training status, business &amp; enrollment trends, market trends, marketing activities, revenue, expenses and profitability data; program development, investments; competition, assets and so forth.</p> <p><b>SWOT Analysis:</b> Identify and prioritize your top issues, opportunities, threats, trends, weaknesses outlined in a SWOT analysis to devise strategies. An environmental scan analyzes information about the external environment (economic, social, demographic, political, legal, technological and international factors). the industry and internal organizational factors.</p> <p><b>Gap Analysis:</b> Evaluate the difference between the current position and future position and identify the resources to fill the gap. (Lerner, 1999, para. 49)</p>	<p><i>Step 2: Create- Generate Idea:</i></p> <p><b>Visualize</b> possible strategies to each insights found in Step 1</p> <p><b>Understand</b> market and industry trends to reveal the potential for new or expanded markets  (Cross &amp; Dublin, 2002)</p>
	<p><i>Step 3: Judge: Select Best Options</i></p> <p><b>Develop</b> strategic selection criteria (potential revenue, return on investment, risk, strategic fit, timing, etc) and apply them to your concepts and options.</p> <p><b>Benchmarking</b> measuring and comparing operations, practices and performance.  (Bates, 2000 p. 46)</p>
<p><i>Step 4: Plan: Develop Strategic Plan</i></p> <p><b>Mission:</b> the purpose of the plan in a single sentence reflecting major goals and performance objectives.</p> <p><b>Environmental scan &amp; demographic analysis:</b> a review of the characteristics of your employees; demographic factors to consider include educational levels, occupations, ages, and household income, as well as access to technology; analysis review of local and national demographic information, economic information, and company/industry analysis.</p> <p><b>Vision:</b> A concrete description of what it would look like to fully achieve what you would really like to do</p> <p><b>Objectives-goals:</b> What are you trying to achieve, in observable terms, over the next three to five years.</p> <p><b>Strategies:</b> Actions to achieve your goals which serve as an implementation plan.</p> <p><b>Monitoring:</b> Ways of measuring achievements &amp; adjusting strategies to keep on track for implementing goals.  (Shacklford, 2002)</p>	

## **Leadership**

Strategic planning implies organization-wide participation, which can only be achieved if people believe that their involvement counts in sustaining distance training. One of the most important factors in successful participation is the level of support provided by an organization's top leaders (Lerner, 1999, para. 48). Building an organizational culture that embraces elearning means building leaders who:

create a vision for what needs to be done and outline the steps needed to succeed in achieving that vision; these leaders are people who have the capacity to motivate and inspire others to think beyond current frameworks; change mindsets and practices; and gain collaboration and commitment (Latchem & Hanna, 2001, p. 53).

Top management should exhibit enthusiasm, champion, and allocate resources while encouraging and rewarding interdepartmental cooperation and in addition to establishing the vision, strategically link planning, program implementation and tools such as budgeting, infrastructure development, communication, workforce development and policy revision (Berge, 2001, p. 351). According to Berge and Kendrick (2005) the impact of elearning in an organization is widespread, forcing changes in accounting processes, IT, training, staff, skills, etc., and leadership must maximize the use of resources to include human resources, funds, equipment, partnerships and collaborations to gain the maximum benefit in meeting organizational objectives and return on investment (para. 17).

Although leadership has a strong influence on the ultimate shape and identity of an organization's culture, teamwork is also essential for implementing strategies. Leaders

must plan effectively for change and apply appropriate processes for managing the change at the organizational level. Specifically, they need to:

a.) create and communicate a meaningful business case that motivates learners, managers and the entire organization; b.) pull together a well respected and effective team to champion, plan, and support training efforts; c.) develop and implement a change communication program to reach all learners, managers, staff, and d.) recruit an organizational wide base of change agents at all levels to help communicate the vision and remove obstacles (Cross & Dublin, 2000, p. 20).

As the program matures, senior management must also provide ongoing support, training, feedback and resources to ensure that the goals and objectives of the training initiative are continuously representing the mission of the institution (Chute, Melody, & Hancock, 1999).

### **Student Support**

Generally, because decisions related to distance training, such as who participates, what will be taught, and so forth, are usually made to align with organizational goals (i.e. increased performance and efficiency), employees value and respond well when they feel they have the necessary technical, content and managerial support ” (Shackelford, 2002, p. 36). Management can help the elearning initiative move forward by creating a learning environment that bridges training with work. Rossett (2002) identifies some of these culture-building strategies as:

1.) Provide a manager/coach for accountability, 2.) Implement a pay/performance incentive program, 3.) Present material rewards and/or certifications when appropriate, 4.) Make access to technology easily available and, 5.) Grant time on the job to learn (p. 201). Support assures that training events are technology-enabled, to help reduce travel and direct instructional costs, while social features, such as real time group chat or live peer audio conferencing are integrated to help make learning more psychologically and socially attractive (p. 59).

### **Change Management**

When introducing elearning into an organization, an effective change management strategy must be implemented as well. Change processes have to address multiple points of inertia and resistance and have to be systemic rather than piecemeal. They call for clearly articulated and commonly accepted goals and values, with matching policies, procedures and resources (Latchem and Hanna, 2000, p. 41). According to Rosenberg (2001), an effective change strategy is about moving an organization towards its goals by improving the performance, productivity, speed, flexibility, and motivation of the workforce, and about building the capabilities of business leaders to lead sustainable change. Delaying a change strategy until elearning is deployed can jeopardize the entire initiative, but launching one prior to implementation can enhance its success (p. 202). Berge (2001) suggests that the tools for organizational change have to do with acceptance, and barriers include: motivation, reasons for participating, timing, location, length of the training program, marketing, communication, promotion of the training event, incentives, level of support for learners and trainers, and learning environment (p. 355).

### **Obstacles to Organizational Change**

The success of any distance training programs depends on the extent, to which an organization proactively identifies, and addresses, the various issues that act as barriers toward their distance learning efforts. According to a survey conducted by Berge and Kearsley (2003) the biggest challenges associated with sustaining elearning programs are in areas of: a.) recruiting and retaining staff, b.) identifying what training needs were best met by elearning, c.) creating and maintaining an interest in elearning, d.) lack of consistent direction, support, or involvement from management, and e.) keeping up with rapid changes in technology (para.31).

### **Solutions to Overcoming Obstacles**

Berge and Kendrick (2005) claim that not only should an organization establish a philosophy that uses technology effectively, but also one that supports equal access to training materials, updated information, maximizing resources, and promotion of training that will support organizational objectives (para. 15). They analyze several solutions for implementing and maintaining distance training programs. These include:

Developing partnerships and collaborations with other organizations; providing training programs that support the professional development of leaders at all levels; providing training and access to a wide array of resources; providing management with a sense of structure, and access to instructional and technical support; seeking new and innovative technology to stay informed on the latest developments; providing funding to allow management to seek a highly qualified staff to maintain a high level of internal expertise and seek outsourcing help when practical, and

creating policies that support professional development and organizational growth (para. 18).

Following Berge's model (2001) of organizational maturity in regards to the delivery of distance training, the further an organization moves into becoming a stage 4 operation, the greater the use of management systems, support, processes and tools (p. 27). A strong management system is another key to sustaining distance training programs, and management activities include the following: program support, finance & administration support, technical support, and marketing.

### **Program Support**

An important lesson in sustaining distance training is that "technology, or any other delivery medium, is only a means to deliver effective learning and not an end in itself" (Rossett, 2002, p. 22). According to a report on the high dropout rates in elearning, the American Society for Training & Development (2002) indicates that the major reasons for high attrition rates relate mostly to human factors, such as lack of incentives, lack of accountability for course completion, and the inability of poorly designed courseware to keep learners' attention (Rossett, 2002, p. 167).

Phillips (2002) adds that the main reason corporate elearning fails is based on internal factors which are identified on three levels: 1.) *Product level* (poor course design, inadequate technology infrastructure); 2.) *Learner level* (poorly prepared learners, lack of motivation, limited time); and/or 3.) *Organizational level* (low managerial support, lack of reward structure) (para. 7). Organizations must be concerned with the needs of their workers, and pursue a balanced approach to identify the human dimension of learning.

Factors, such as collaboration, integration, preparation and motivation all must be considered for sustaining distance training.

### **Financial & Administrative Support**

Providing funding support as a budget item from the central resources of the organization firmly establishes technology-enhanced learning as part of the organizational culture and must cover all areas including support services, instructional development, infrastructure and faculty development (Berge, 2001, p. 352). An organization must provide adequate funding for implementation and support. Costs to consider include: projected start up costs, technology selection, equipment purchases, cost of materials, license agreement with vendors, annual & ongoing operating costs, technical and facility operation (on-site option such as lab availability), marketing expenses, personnel (sales and administration), support services, materials/supplies, subject matter expert, blended training methods, and hardware and/or licensure fees (Hall, 2001).

### **Technical Support**

Whether technical support is internal or outsourced, best practices include recognizing the importance of appointing a team in charge of the information technology policy throughout the organization. Successful practices develop and organize a staff responsible for the technology infrastructure, academic technology policy, and administrative requirements of the system (Bates, 2000, p. 193). This includes a team of experts who keep abreast of technological development, technicians who maintain hardware and software installations and up-date equipment, and IT professionals who provide ongoing training and support of internal staff in charge of elearning technologies (Bates, 2000). Technical support includes:

manuals that lists equipment and software requirements, student support access, online tutorials, institution-wide information, as well as traits and abilities necessary for what it takes to be a successful online learner (Perrin & Mayhew, 2000, p. ). A help desk feature is also necessary to address technical questions "regarding access codes, connectivity problems, and hardware specifications (Kumiko & Pogroszewski, 1998, para. 28).

## **Marketing**

In order for an elearning initiative to catch on, an organization must successfully develop a marketing strategy providing resources and materials across the enterprise. Marketing is a critical element in sustaining distance training programs because it ensures that employees know of the training opportunities available to them and gets them to buy in to the importance of distance training as part of the organization's mission. Marketing messages must be constant and delivered via multiple channels (i.e.: publications, website, advertisements, emails, flyers, posters, training events, etc) (Berge, 2002, p. 248).

## **The Communication Process**

Moving an organization to distance training requires a wide range of strategies and processes and communication is the starting point for gaining commitment and support. It helps build a community of people, at all levels of the organization, who are aware of, engaged in, and committed to elearning and requires input from all levels (training managers, developers, instructors, administrators), clients (students, companies, organizations, sponsors), and stakeholders (senior managers, business partnerships, Board of Directors), as well as across all organizational functions (Rosenberg, 2001, p. 292). Cross and Dublin (2002) outline five important factors in maintaining communication:

a.) keep sponsorship visible because the highest level of leadership and support must be visible at all time; b.) communicate a clear vision, c.) remember that everyone is responsible for the success of sustaining distance training, d.) provide feedback mechanism to allow for evaluation and corrections; and e.) deliver credible content and communicate information that is consistent with other messages, actions, and company initiatives aligned with the organizational culture (p. 45).

### **Conclusion**

Many organizations are interested in the benefits of elearning--cost savings, flexibility, increased productivity, faster deliver, etc. -- but the adoption of distance training programs across the enterprise comes from the result of proper organizational planning. The preceding analysis outlined that process and provided a solid foundation for implementing and sustaining distance training programs. It highlighted the importance, and complexity, of strategic planning, and identified the continuous efforts of linking together all aspects of the organization (leadership, infrastructure, culture, support, change, etc) in order to achieve the highest level of success and maturity.

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