



# OPTIMIZE YOUR LEARNING BUSINESS

Insights & Highlights  
from LTD 2020



**Learning.  
Technology.  
Design™ • 2020**

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## INTRODUCTION

We offer this resource as a supplement and complement to the learning that occurred during the live online sessions at [Learning • Technology • Design™ \(LTD\) 2020](#), our annual virtual conference for professionals in the business of continuing education, professional development, and lifelong learning. It is a companion to enhance the recordings captured from the live event and to help those who attended live in remembering key takeaways and (we hope!) putting them into action.

If you didn't register for LTD 2020, you may still find significant value in this resource on its own. If, however, you would like to get access to the recordings, slides, and ongoing discussion, you can register for the Leading Learning Connective—where we house these items—at <https://learn.leadinglearning.com/join>.

We had truly excellent session leaders for LTD, a great blend of seasoned learning business practitioners and expert thought leaders. The event truly would not have been possible without these people—we thank them!

And we also thank the participants who contributed so much to the value of the event—many insights and tips you see shared in this resource come from session participants. Again, the event would not have been possible without them, and we're sincerely grateful for their part in making LTD 2020 what it was during the live sessions and what it will continue to be.

In what follows here, you'll find background information on session leaders, as well as their responses to four questions about a key takeaway from their session. You'll also find highlights and insights from the vibrant chat that accompanied the sessions.

Lastly, and most importantly, we hope this resource can be a catalyst for your own thinking about how to grow and improve as a learning business professional. ▶



*Jeff Cobb & Celisa Steele*

*co-hosts of LTD*

*co-founders of Tagoras & Leading Learning*

# THE LEARNING BUSINESS

Over time, we've moved toward having a unifying theme for each year's Learning • Technology • Design virtual conference. For 2020, the theme is the concept of the learning business.

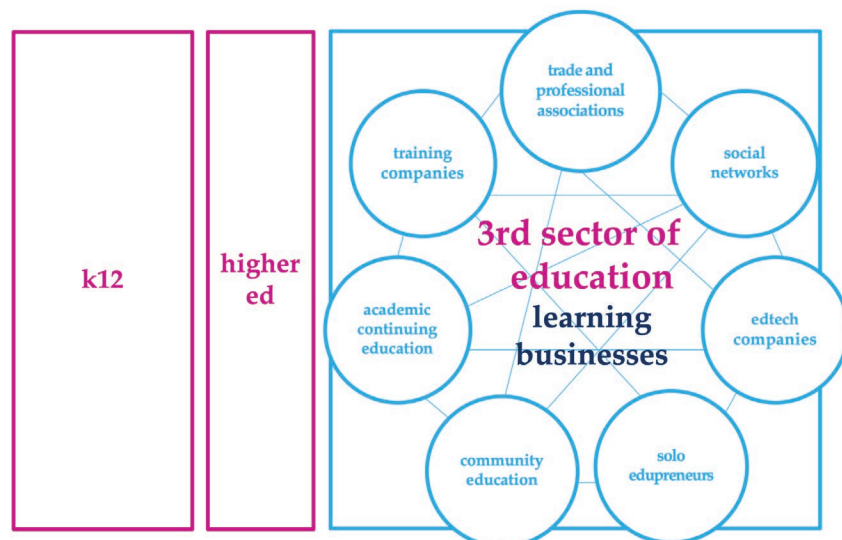
To be in the learning business is to work for an organization that not only creates learning experiences but also aims to generate revenue through selling these experiences to a target audience. Our focus is specifically on learning businesses that serve adult lifelong learners, and we view these businesses as playing an increasingly important role in our current world.

We've traditionally had well defined early and higher education systems that have supported us, but a much more defined third sector of education has emerged and is continuing to evolve to support the newer, ongoing, lifelong needs for learning. This third sector has always been there, of course, but it is getting more attention as recognition of the critical role of lifelong learning grows.



A wide range of learning businesses makes up the third sector. The traditional players, like trade and professional associations and academic continuing education units, have been joined by a flood of start-ups, solo edupreneurs, edtech companies, and even social networking companies like Facebook and LinkedIn. While there are clear differences among these learning businesses that serve the third sector, there are also many similarities. We see connections among them and the potential for a vibrant community of practice to emerge.

We asked each concurrent session leader at LTD 2020, "What does it mean to you to be in the learning business?" Their answers are captured in this resource, but we also encourage you to consider your own answer. What does it mean to *you* to be in the learning business? ▶





# THE Leading Learning CONNECTIVE



1

## **CONSULTATIVE EXPERTISE**

The Connective is an initiative of Tagoras, a firm that has consulted with organizations in the business of continuing education, professional development, and lifelong learning for well over a decade. As a member of the Connective, you can engage directly with Tagoras principals Jeff Cobb and Celisa Steele and tap their expertise and experience in launching and growing multiple learning businesses and researching and writing extensively on related topics.

2

## **COMMUNITY OF PRACTICE**

Members of the Connective are learning business professionals with significant knowledge and experience. The ability to engage with other members, ask questions, and share insight, tips, and best practices represents value that simply can't be found anywhere else.

3

## **BODY OF CONTENT**

The Connective is where all the recordings from past Learning • Technology • Design virtual conferences are hosted, along with recordings from a range of Leading Learning Webinars. Valuable knowledge is also shared through uploaded resources and the discussion forums. Strong search capabilities make it possible for you to find content in the topic areas most important to you.

[learn.leadinglearning.com/join](http://learn.leadinglearning.com/join)



# Sessions & Speakers



# THE LAY OF THE LAND FOR DIGITAL LEARNING: THE PRACTICAL IMPLICATIONS OF AI, QUANTUM COMPUTING, AT-SCALE DEGREES, AND MORE

// Ray Schroeder //

## A KEY TAKEAWAY

Learning methods and modes are changing.

## WHY THIS IS IMPORTANT

Competition will overtake your efforts if you fail to respond to the new trends in learning.

## HOW TO USE THIS

Build interactive, adaptive, and at-scale learning.

## THE RESULT

You can reach more learners with high-quality offerings.

No discussion of AI is complete without considering the impact of quantum computing



“5G will be important to support augmented reality—I would certainly like to bring AR into our current programs. But in a way that is EASY for our learners.”

—Mary Rehm

“I’ve often thought that MOOC/at-scale offerings could be useful for (a) exposing people to the profession/member recruitment and (b) addressing orientation/perennial fundamentals that are common across a profession/industry.”

—Jeff Cobb

“Especially for professions that have a stereotype they want to change in the eyes of the pipeline, a free/low-cost option could reach populations who may otherwise never get exposed.”

—Josh Goldman



## RAY SCHROEDER

*Senior Fellow, University Professional and Continuing Education Association (UPCEA)*

A nationally respected and connected leader in higher education online learning, Ray Schroeder is senior fellow of the University Professional and Continuing Education Association (UPCEA) and professor emeritus/associate vice chancellor at the University of Illinois Springfield (UIS). After several years as an instructor at the University of Illinois at Urbana-Champaign, he came to the university in Springfield in 1977, beginning as assistant professor, then associate, then full professor, prior to becoming an emeritus professor in

2001. During his tenure, he launched the online learning program at UIS in 1997. He founded the Center for Online Learning, Research, and Service and became associate vice chancellor for online learning in 2013, a position he continues to hold.

The recipient of numerous national awards and citations for individual excellence and leadership from many associations and entities including the Sloan Consortium (OLC), US Distance Learning Association, American Journal of Distance Education, Illinois Council for Continuing Higher Education, University of Wisconsin, and University of Illinois, Ray is the author of book chapters, articles, widely read blogs, and social media feeds on news and research in online learning/educational technology. Ray is a noted speaker, consultant, researcher, and author on topics related to online learning, emerging educational technologies, and technology-enhanced learning.

**What do you think the most critical thing anyone who wants to support lifelong learners needs to be thinking about right now?**

**“We need to be thinking about what the coronavirus means to those of us in the learning business. We need to be prepared to describe the advantages and respond to those who need the virtual environment in order to avoid this virus. As we move forward, we’re going to see more and more demand for online delivery.”**

*—Ray Schroeder*

# SHARING TALENT AND CONTENT ACROSS THE ORGANIZATION

// Nick Olig //

## A KEY TAKEAWAY

Sharing information is critical to the success of any organization. Sharing content and talent across an educational organization is critical for the success of the learner.

## WHY THIS IS IMPORTANT

Working within silos, apart from others, limits understanding and perspective and, ultimately, stagnates the evolution of the learning experience.

## HOW TO USE THIS

Make time for sharing information, even if it's uncomfortable. Look for opportunities to share beyond what's immediately in front of you.

## THE RESULT

Increased product awareness. More revenue. Stronger relationships with external talent (e.g., speakers and subject matter experts).

“How does one incentivize breaking down silos? We share talent, but usually it is because a grant requires us to. Furthermore, parts of the organization that may be on a different grant or funding source are not necessarily incentivized to share.”

—Gerrard Jolly

“Since a lot of our programmatic work is philanthropically and/or government-funded, we struggle with the balance between developing for the audience the funder wanted versus in support of our learning program. We have recently been working with our development team to write in a specific, low-lift add-on content piece or delivery outlet to try to expand the usefulness and reach of what in the end is a lot of amazing content. We can give credit to the program and/or the funder, which is usually a win-win.”

—Julia Richards

## NICK OLIG

*Director of Online Learning, International Foundation of Employee Benefit Plans (IFEBP)*

Nickolas F. Olig is the director of online learning at the International Foundation of Employee Benefit Plans in Brookfield, Wisconsin. He has 20 years of experience designing, developing, and implementing Web-based user interfaces and systems.

Nick is responsible for project management, technical development, and implementation of all online training programs, including e-learning courses, Webcasts, virtual conferences, and Web-based certification testing. He oversees all related budgetary planning, coordination with internal and external stakeholders, and ongoing analysis of market trends. Nick has experience with learning management systems, content management systems, customer relationship management systems, and database platforms.

Nick holds a bachelor of arts degree in mass communications from the University of Wisconsin-Milwaukee and a master's degree of business administration from Marquette University.



**What does it mean to you to be in the learning business?**

**“What makes my job so rewarding is knowing that the education we offer impacts far more than the immediate learner.”**

*—Nick Olig*



# inbox intelligence for learning leaders

Want to stay on top of the latest trends in the market for continuing education, professional development, and lifelong learning? Looking for tips and insights to help take your learning business to new levels? Sign up for the free Leading Learning newsletter, and we'll send you resources each month to help grow your reach, revenue, and impact.



*[leadinglearning.com/newsletter](https://leadinglearning.com/newsletter)*



# BETTER LEARNING, HIGHER IMPACT: A PRACTICAL LOOK AT METALEARNING

// Celisa Steele //

## A KEY TAKEAWAY

There are ways we can design, develop, deliver, and market learning experiences that can support—or thwart—learners’ ability to gain and apply new knowledge or skills.

### 12 metalearning principles

#### set

- mindset
- motivation
- autonomy
- past experience
- memory
- lifestyle factors

#### setting

- relevance
- context
- practice
- effort
- feedback
- reflection

### WHY THIS IS IMPORTANT

Understanding and leveraging metalearning principles (such as motivation, autonomy, relevance, and reflection) improves the chance that individuals will learn something in the first place, be able to apply new knowledge and skills, and continue to apply them. Metalearning, in short, improves the chances that learning will stick.

## HOW TO USE THIS

Few learners are ever taught how to learn. Metalearning’s ability to support effective learning coupled with the usual silence on the subject creates a tremendous opportunity for the attentive learning business. Leveraging metalearning principles can become a competitive advantage/ differentiator.

## THE RESULT

If we can help the adults we serve be better learners, they’ll learn more, they’ll apply more, and they’ll be more likely to return to us for more educational offerings.

“Connect learning outcomes to making one’s own job easier or more pleasant.”

—Andrew Gilliam

“Ask learners what they want to get out of the session.”

—Elaine Carr

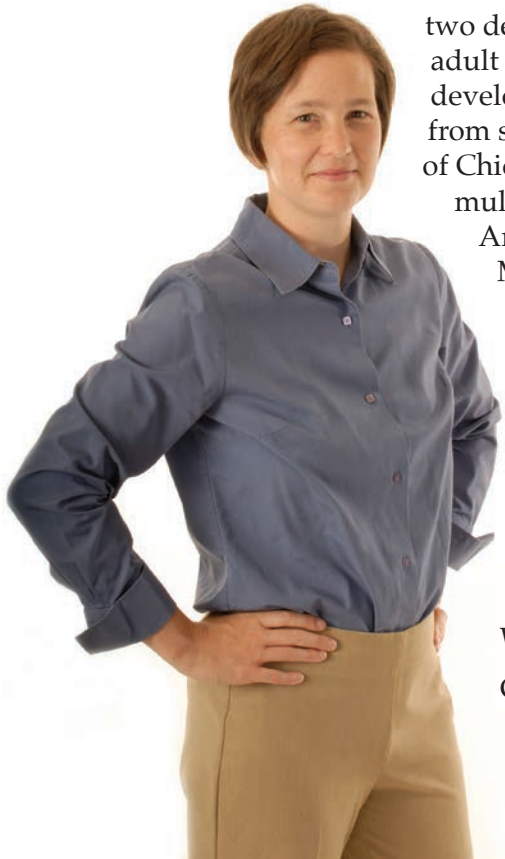
“Regarding feedback, I sometimes ask people at the end of a Webinar to say in the chat what one thing they will do or try based on content.”

—Susannah Poe



## CELISA STEELE

*Co-Founder, Tagoras and Leading Learning*



Celisa Steele, co-host of Learning • Technology • Design, has spent two decades designing, developing, delivering, and marketing adult lifelong learning, continuing education, and professional development. She's worked with and for organizations ranging from smaller groups like the Frameworks Institute and the Alliance of Chicago Community Health Services to large national and multinational organizations like the American Red Cross, the American College of Radiology, the Society for Human Resource Management, and WebJunction, an initiative of the Bill & Melinda Gates Foundation.

Celisa was co-founder and chief operating officer of Isoph, one of the leading providers of e-learning services to the nonprofit sector. Prior to Isoph, she worked as vice president of operations for LearnSomething; in creative services at Quisic, a developer of high-end online course content for major universities and Global 2000 companies; and in curriculum development at the not-for-profit Family and Children's Resource Program, part of the School of Social Work at the University of North Carolina at Chapel Hill.

Celisa co-hosts the weekly Leading Learning Podcast, writes frequently on the imperative of lifelong learning in today's world, and embraces the joys and possibilities of learning. Celisa is also a poet.

**What does it mean to you to be in the learning business?**



**“Focus. Being in the learning business gets me thinking about the learning I love differently, more directly and consciously. It broadens my focus, so I’m not only thinking about the topics, but I’m also focused on the context in which learning happens and what can make that experience more effective and enjoyable.”**

*— Celisa Steele*

# SOLVING THE ONLINE LEARNER ENGAGEMENT CHALLENGE THROUGH ACTION MAPPING

// Laura Shelters //

## A KEY TAKEAWAY

It's important to have a strategy and a process for developing online learning. Action mapping can serve as the foundation for creating relevant and engaging learning experiences.

## WHY THIS IS IMPORTANT

Online learning is different than in-person learning, and understanding best practices helps you engage learners and create valuable experiences.

## HOW TO USE THIS

A virtual learning development strategy helps you provide valuable learning to those you serve and keep them engaged.

## THE RESULT

Learners consider you a trusted partner in professional development when they get value from your content. This results in higher engagement and higher sales.

Poll:  
What do you think the biggest challenge is with bringing education into the virtual space?

“Engaging the learners to give them a similar feel they get from live.”  
—Richard Gordon

“Lack of protected time for learners.”  
—Dario Sambunjak

“Minimizing outside distractions and engaging learners.”  
—Jen Lewi



## What does it mean to you to be in the learning business?

**“I truly believe in servant leadership, and the benefit of it is the ability to remove any barriers people may have to help them reach their maximum potential. For me, that’s what makes it such a blessing to be in the learning business.”**

*—Laura Shelters*

### LAURA SHELTERS

*Director of Content Research & Development, NIGP: The Institute for Public Procurement*

Laura Shelters has over nine years of experience improving operations through curriculum development, with a focus in needs analysis, instructional design strategies, learning management system implementation and management, customer engagement, instructional technologies, 508 compliance, digital badging, and training evaluation.



Laura earned her bachelor’s of Business Administration in marketing from Marshall University, her master’s of science in business education, and a master certificate in training and development from Southern New Hampshire University. She has also earned the Project Management for Learning Professionals certificate through ATD and the Leadership Essentials certificate through Cornell.

# GOING VIRTUAL WITH HANDS-ON LEARNING SOLUTIONS

// **Lauren Kaczmarek & Laura Steele** //

## A KEY TAKEAWAY

Performance-based learning and assessments are highly relevant for learning businesses today.

## WHY THIS IS IMPORTANT

The speed of technology advancement has left us with a skills gap in many areas. One way to help address the gap is to create learning that builds actual skills and not just knowledge of those skill sets.

## HOW TO USE THIS

Explore ways to incorporate hands-on, skills-based learning in your learning portfolio.

## THE RESULT

A broader, more comprehensive portfolio of offerings helps ensure relevancy in the face of technological advances.

“Using third-party developers has been a very successful and affordable experience for us. Of course, it depends on your needs, but we’ve found it’s often less expensive to hire for short-term development than to hire in-house.”

— *Veronica Diaz*

“We have a full-service contract with our LMS provider, so I treat that team as another team member. It allows us to extend our capabilities for course development.”

— *Mary Rehm*

“We have used third-party developers mostly for standalone projects that are not ongoing. Experience has been wide-ranging.”

— *Elaine Carr*

## LAUREEN KACZMAREK

*Head of Learning Science & Design, ISACA*

Laureen Kaczmarek leads ISACA's learning science and design strategies, ensuring the association leverages innovative education technology and accommodates the ways different generations of learners prefer to learn. She interprets information and guides the development teams in incorporating learning design concepts into ISACA products as part of ISACA global learning strategy execution. She is currently leading an innovative approach to defining the learner journey at ISACA, leveraging in-depth interviews, quantitative research, and human-centered design thinking.

During her tenure of 13+ years at ISACA, Laureen has held several leadership roles and transformed ISACA's learning programs, contributing to a 68 percent revenue increase in a three-year timespan. Her focus on exceptional experiences and outcomes is evident in her approach to program development. She managed global conferences and meetings in addition to a robust portfolio of synchronous and asynchronous online offerings that touch over 100,000 professionals and represent \$12.5M of ISACA's revenue portfolio.

Lauren has a lifelong passion for learning. In addition to earning her BS in Finance from University of Illinois in Champaign-Urbana, she has an MBA from DePaul University in Chicago and a Master Online Teaching Certificate from the University of Illinois. She is a former learning consultant for community colleges providing training and learning experiences for enterprise and nonprofit organizations. She has developed and facilitated hundreds of training offerings in online and in-person formats on topics ranging from software application to leadership. She is currently an active mentor in the DePaul alumni program, an ATD member, and a contributor to the .orgCommunity network.



**What does it mean to you to be in the learning business?**

**“Being in the learning business is a tremendous opportunity to influence a learning culture in the workplace. With the advancement of technology, we’re at an inflection point, where we need to have a learning culture that’s strong and supportive as we work hard to upskill and embrace the changes that technology is making in the work environment.”**

*—Laureen Kaczmarek*



## LAURA STEELE

*Product Manager, Cybersecurity, ISACA*



Laura Steele manages ISACA's Cybersecurity Nexus (CSX) product line and ensures that new and existing products meet the needs of today's cyber professionals. She interprets customer feedback, market trends, and internal data to make informed product decisions that align with ISACA's global learning strategy. Laura is currently leading an ambitious initiative to update ISACA's proprietary CSX Training Platform LMS.

During her 18 years in marketing, product development, and product management, Laura has experience working in nonprofit, B2B-, and B2C-focused environments across the academic, financial, and IT industries. Her focus on successful product ideation, development, and launch has stemmed from large initiatives

involving complex cross-functional internal and external teams. Laura's organized and data-driven approach ensures stakeholders have the information and processes they need to make informed decisions.

Laura has a strong focus on collaboration between customer and company to deliver positive results. In addition to earning her BA in Marketing from the University of Wisconsin at Eau Claire, she has an MBA from North Park University and a certificate in Strategic Marketing from the University of Chicago's Booth School of Business.

**What does it mean to you to be in the learning business?**



**“For me it's about facilitating the fulfillment of personal enrichment—whether that's career change, career development, or personal growth. Helping individuals and businesses realize those goals for their learners is something that I really enjoy”**

*—Laura Steele*



# WE'RE ALL LEARNING EXPERIENCE DESIGNERS NOW: LXD 101

// **Micène Fontaine** //

## A KEY TAKEAWAY

Context over content.

## WHY THIS IS IMPORTANT

Your learners will not stick around if the experience gets in the way of them achieving—rather than supporting them in achieving—their goals and/or if it is not aligned with their motivations.

## HOW TO USE THIS

Concretely, this means that once you are clear on who you are designing for and what you are solving for, then you should test, test, and test your proposed learning experience (early and often), then iterate. Ask a learner (or anyone who was not part of the team who designed the learning experience) to test and pilot as much of the experience as possible, even if it is just a prototype.

## THE RESULT

This will allow for unnecessary frictions to be removed from the experience so learners can concentrate on learning.

**“Reduce friction, and increase motivation.”**

*—Stelu Hidalgo*

**“Make an emotional connection to learners.”**

*—Toni Vega Aiken*

**“Emotional connections ‘sell’ the learning more than logical or value-based pitches.”**

*—Amy Dreher*

**“We are not thinking machines that feel, we are feeling machines that think”**

**António R. Damásio**

Portuguese-American neuroscientist



**What does it mean to you to be in the learning business?**

**“To me, it’s about freedom—the freedom to try, to grow, to fail, to go from whoever we are now to whoever we want to be. And to do the same thing for our learners.”**

*—Micène Fontaine*

## **MICÈNE FONTAINE**

*Executive Director, Design Arts Seminars*

Micène Fontaine, executive director of Design Arts Seminars, has spent the past 20 years designing learning experiences that help licensed architects and interior designers learn what they need to know in order to design a world in which all of us can thrive. As an avid consumer and designer of learning experiences, Micène’s focus remains on orchestrating the most delightful learning experiences possible across online, in-person, and study-abroad offerings.

# THE PODCAST PATH TO REACH, REVENUE, AND IMPACT

// Jeff Cobb //

## A KEY TAKEAWAY

Podcasting offers a dynamic, cost-effective way to reach learners in the flow of life and work and connect the pieces of a comprehensive learning strategy.

## WHY THIS IS IMPORTANT

We often put too much emphasis on creating traditional, formal learning experiences, even though we know most learning happens informally. This can cause us to miss valuable opportunities to connect with our learners more frequently and in ways that really support learning as a process rather than an event.

## HOW TO USE THIS

Podcasting is something an organization can start doing almost immediately. The equipment and distribution costs are low, and the learning curve isn't steep. There are a range of good ways podcasts can be used to achieve learning impact (not to mention to generate revenue). The main thing that is needed is some strategic brainstorming and planning.

## THE RESULT

Used strategically, podcasts can help broaden and deepen reach, generate significant revenue, and support sustained learning impact.

"Podcasting opens my content to those with lower bandwidth."

—Jillian Starman

"A podcast could continue engagement beyond events."

—Laine Capaccio

"We would love to use podcasting to bring our community together. Until today I hadn't thought about it linking to our paid learning!"

—Mary Rehm

"Podcasts are a great way to reach people who are commuting, cooking, dog walking, working out, cleaning, etc.—spare-time learning."

—Julia Kirby

## JEFF COBB

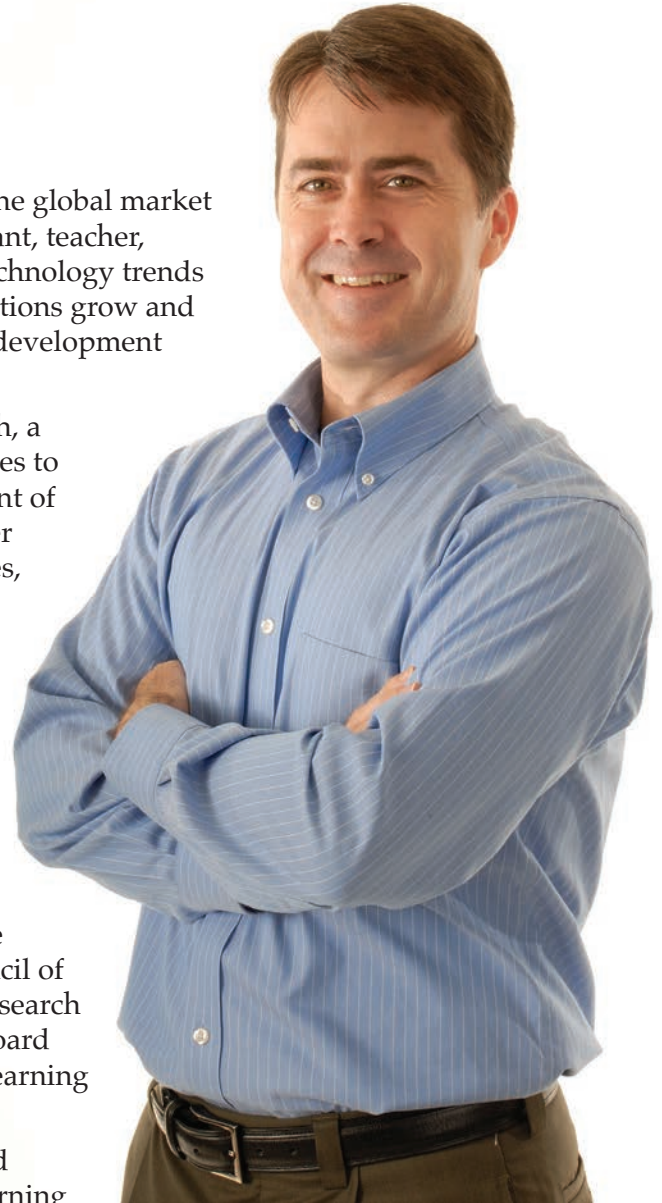
*Co-Founder, Tagoras and Leading Learning*

Jeff Cobb has spent nearly two decades immersed in the global market for adult lifelong learning as an entrepreneur, consultant, teacher, and author. He has been at the forefront of learning technology trends and has developed deep expertise in helping organizations grow and improve their continuing education and professional development businesses.

Prior to Tagoras, Jeff was co-founder and CEO of Isoph, a leading provider of e-learning technologies and services to associations. He has also served as senior vice president of business development for Quisic, an e-learning partner to top-tier business schools and Fortune 500 companies, and vice president of business development for LearnSomething.

Jeff is a vocal advocate of cradle-to-grave lifelong learning, an award-winning teacher, and author of multiple books, including *Leading the Learning Revolution* and *Shift Ed*. He currently serves on the governing board of NIGP: The Institute for Public Procurement, to which he was specifically appointed as an education thought leader. He has previously served on the advisory board of Future Learning, the Professional Development Section Council of the American Society of Association Executives, the research committee of the eLearning Guild, and the editorial board of *Innovate*, a publication focused on innovations in learning and technology.

Jeff co-hosts the weekly Leading Learning Podcast and speaks frequently on topics related to the future of learning and the transformational power of lifelong learning. More information about his speaking is available at [jeffthomascobb.com/speaking](http://jeffthomascobb.com/speaking).



**What does it mean to you to be in the learning business?**

**“I like the challenge of it being a business because not only do we have to create learning experiences that are high-quality and impactful in our eyes, they actually have to be high-quality and impactful in the eyes of the potential learners—enough so that they are willing to purchase them.”**

*—Jeff Cobb*

# HOW TO GET MORE VISITORS TO CLICK THE “BUY” BUTTON

// Tony Paille //

## A KEY TAKEAWAY

You have to make it easy for your Web visitors to understand what they’re buying and how to do it.

## WHY THIS IS IMPORTANT

Consumer behavior is changing. Buyers aren’t just comparing their experience with your organization to your nearest competitors but to all of the experiences they’ve had. You have to remove all of the friction from the buyer experience, or you’re going to lose them as customers.

## HOW TO USE THIS

Conduct an audit of the product pages on your Web site and look for these things:

- Confusing language
- Unnecessary information (clutter)
- Confusing navigation
- Dead-end pages

Work to remove these to create a more frictionless buyer experience.

## THE RESULT

Completing this exercise will greatly improve the conversion rates of your product pages and improve your contact-to-customer rate. That means more money in the bank.

“Who here knows what ITIL® is?”  
—Roy Atkinson

“We have a link to lesson descriptions but nothing to take them back to the course page for purchase, unless they hit the Back button.”  
—Elaine Gudmunsen

“This was a great exercise—found some ways to remove text in relation to our flagship cert program that would ONLY be applicable to a CURRENT candidate. Looking forward to a site audit with our marketing team.”  
—Mary Rehm



## TONY PAILLE

*Chief Revenue Officer, AIIM International*

Tony Paille is the chief revenue officer for AIIM International, a membership association offering training and certification for information professionals, where he is responsible for managing the sales and marketing teams and driving revenue growth. Tony lives in Massachusetts with his pug, Ronnie. He loves listening to punk rock, watching *Seinfeld* re-runs, and eating Impossible Whoppers.

**What do you think the most critical thing anyone who wants to sell to lifelong learners needs to be thinking about right now?**

**“It comes down to two things—building trust and creating a remarkable user experience.”**

*—Tony Paille*



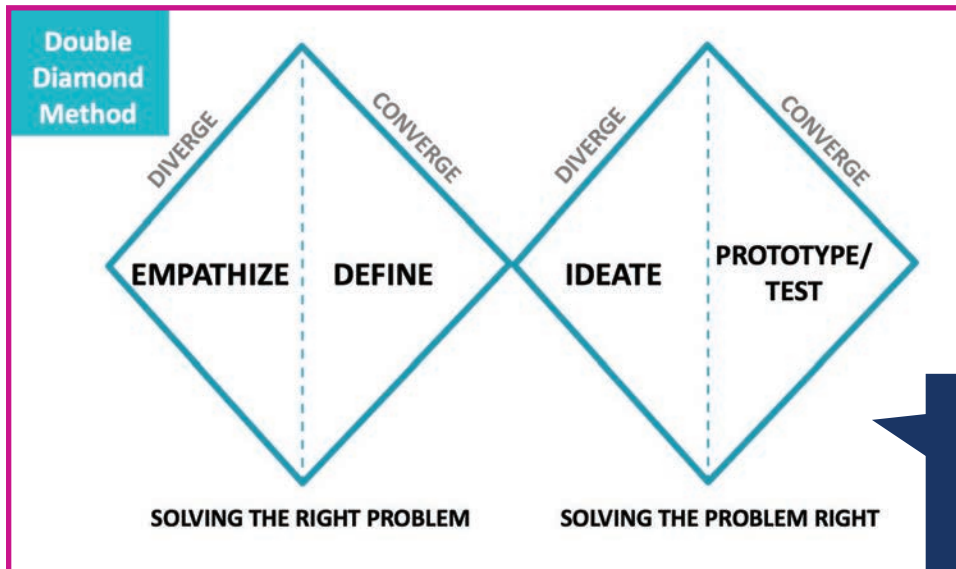


# CRAFTING LEARNING EXPERIENCES WITH DESIGN THINKING TECHNIQUES

// **Connie Malamed** //

## A KEY TAKEAWAY

Design thinking is a framework for collaboratively generating creative solutions to challenging problems. Its four phases are empathy with the audience, defining the correct problem, ideation, and prototyping and testing.



“I would be intrigued to have our SMEs try out an empathy map.”

—Ed Schelb

## WHY THIS IS IMPORTANT

The 21st-century workplace is unique. Information changes quickly, skills are complex, and people need to continually update their skills. The flexible design thinking framework offers tools for meeting modern learning challenges.

## HOW TO USE THIS

You can use all or part of the design thinking framework with interdisciplinary groups to create innovative solutions to sticky problems.

“Solo brainstorming is actually fun and relaxing.”

—Jen Lewi

## THE RESULT

Design thinking can help you see challenges from a new perspective, gain insights into your audiences, and produce creative outcomes, in your marketing, sales, and product design.

“I prefer group brainstorming—you feed off others’ ideas.”

—Maddie Grant

## CONNIE MALAMED

*Founder, Mastering Instructional Design Community*

Connie Malamed is a learning experience design consultant, publisher of The eLearning Coach Website and podcast, and founder of the Mastering Instructional Design membership community. She is an author, international speaker, and workshop facilitator in the fields of learning experience design, design thinking, and visual communication. Connie has helped nonprofit, government, and corporate clients improve performance by creating meaningful learning experiences for more than 20 years. She is the author of *Visual Design Solutions* and *Visual Language for Designers*. Connie has degrees in art education and instructional design. In 2018, she was honored with the Guild Master award from the eLearning Guild for contributions to the learning technologies community.



**What do you think the most critical thing anyone who wants to support lifelong learners needs to be thinking about right now?**

**“The most important thing we can do in preparing people for the 21st-century workplace is to engage them in the practices of human-centered design.”**

*— Connie Malamed*

# VIRTUAL-ONLY CONVERT: A SEMINAR CASE STUDY

// Nora Potter //

## A KEY TAKEAWAY

Creating a virtual event can come with less cost and risk than an in-person event and reap great benefits.

## WHY THIS IS IMPORTANT

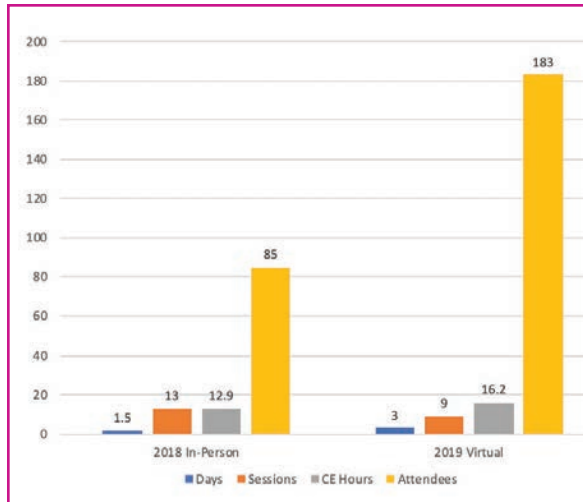
Understanding the cost-savings, lower risk, and other benefits is important in making the case and the decision to go virtual.

## HOW TO USE THIS

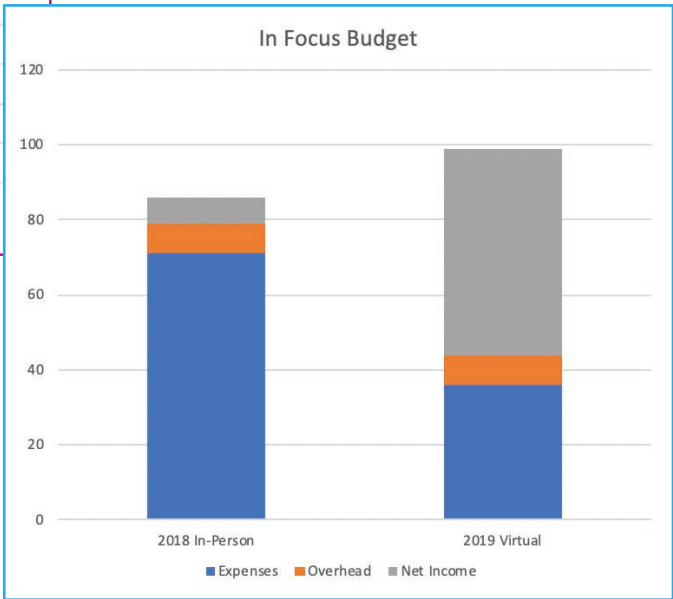
New events can be piloted as virtual events instead of in-person events. Alternatively, old, failing events can be saved by converting them to a virtual offering.

## THE RESULT

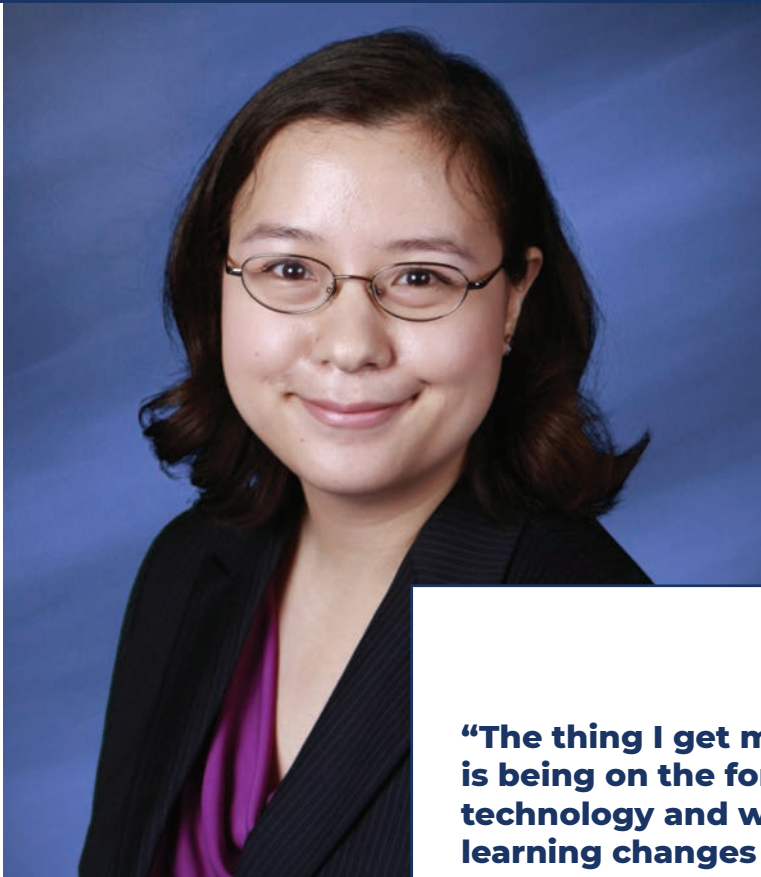
Virtual events will always have a wider reach. Data can be gained from them to inform future events.



“I could see where a virtual event might attract more attendees earlier in their career versus only director level and up.”  
—Andrew Gilliam



**What does it mean to you to be in the learning business?**



**“The thing I get most out of my job is being on the forefront of new technology and watching the way that learning changes and evolves.”**

*—Nora Potter*

## **NORA POTTER**

*International and Online Professional Education Manager, Casualty Actuarial Society (CAS)*

Nora Potter is the international and online professional education manager at the Casualty Actuarial Society (CAS). She manages the CAS’s virtual event portfolio, including Webinars, livestreams, and virtual workshops. She also develops content for and manages the CAS learning management system, which houses on-demand content, such as interactive online courses and microlearning series. She launched the successful livestream program at the CAS, which has been running for four years. In 2019, she launched the first virtual-only seminar at the CAS based on an previously in-person event.

To **market and sell** education,  
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platform before you sign a contract.





# GET READY TO MAKE A DIFFERENCE: A THREE-LENS APPROACH TO PREPARING FOR YOUR NEXT LEARNING EVENT

// Nancy Bacon & Mark Nilles //

## A KEY TAKEAWAY

To maximize the learning impact of your conference, you have an important role to play in getting your team, your participants, and your presenters ready.

## WHY THIS IS IMPORTANT

All of the effort you put into planning a conference (or learning event) has a much deeper impact if you invest in getting people ready.

## HOW TO USE THIS

You can engage all three key groups (your team, your participants, and your presenters) in “get ready” activities. You can use these in conference preparation or around any learning event.

## THE RESULT

Expanding focus on “get ready” activities will lead to a better conference with greater ROI for participants and deeper impact on whatever the host organization is trying to move the needle on.

“We developed instructor/speaker guides to creating presentations—they take them step by step through the development process. We then conduct an on-boarding session with ALL instructors and speakers so that they’re all equipped with the same information.”

—Ashley Rapone

“We collect ‘burning questions’ that attendees are hoping to get answers to.”

—Julia Richards

“We recommend participants use our conference app to plan their agenda.”

—Emily Lubin

“We’re really intentional in our call for presentations to ask speakers questions about their instructional design plans and make that an important part of the selection process.”

—Alyssa DelPrete

## NANCY BACON

*Learning Consultant*



Nancy Bacon is a teacher, instructional designer, consultant, and speaker on topics at the intersection of learning and nonprofits. She created Washington Nonprofits' learning program in 2013, the third learning program she designed over the course of her career. A former ESL and middle school teacher, Nancy majored in Germany Literature and Economics at Swarthmore College and holds a Master in Public Administration from the University of Washington.

Nancy regularly writes and speaks about topics related to nonprofits and learning at [www.nancybacon.com](http://www.nancybacon.com). In 2019, Nancy co-authored *Conferences That Make a Difference* with Mark Nilles.

**What does it mean to you to be in the learning business?**



**“For those of us who are nonprofit people, we might shudder at the idea of thinking like a business. And yet thinking like a learning business allows us to think more sustainably, more strategically. A lot of us come into this as accidental teachers, and it encourages us to professionalize.”**

*—Nancy Bacon*

## MARK NILLES

### *Learning Specialist*

Mark Nilles is a learning professional with a non-traditional learning & development background. His work has focused on developing evidence-based teaching and learning approaches for improved workplace performance. His perspective is informed through years of training and capacity building for international development and humanitarian relief professionals around the world. Mark has supported youth employability programs in Palestine and Pakistan, life skills programs in Kyrgyzstan and St. Lucia, and Peace Corps Volunteers in Ukraine and Mongolia.

He writes about workplace learning at [marknilles.wordpress.com](http://marknilles.wordpress.com). In 2019, Mark co-authored [\*Conferences That Make a Difference\*](#) with Nancy Bacon.

**What does  
it mean to  
you to be in  
the learning  
business?**



**“It’s about making a business case for the learning function—really getting a seat at the table, helping to diagnose problems, developing solutions that drive learning and performance, and then using evaluation to continue improving and to demonstrate success when you do have it. So thinking of learning from a business lens drives accountability and helps us to achieve strategic goals.”**

*—Mark Nilles*

# FROM PASSIVE TO ACTIVE: HELPING SUBJECT MATTER EXPERTS UNDERSTAND TODAY'S ADULT LEARNERS

// Tracey Steiner & Jeanne Heaton //

## A KEY TAKEAWAY

If you use subject matter experts (SMEs) to design or deliver learning, invest in them by providing training to help them understand adult learners and improve how they prepare and present.

## WHY THIS IS IMPORTANT

You rely on our SMEs, who may be volunteers speakers, so it is important for them to be appreciated, valued, and cared for.

## HOW TO USE THIS

Training and resources are ways to concretely show your SMEs that they're appreciated, valued, and cared for. This session offers training ideas and resources to help your SMEs improve their presentations.

## THE RESULT

Investing in SMEs with training and resources will lead to more satisfied learners; this, in turn, will improve the quality and reputation of your programs.

"Our SMEs want to be known as experts that our audience will turn to for help. We let them know that providing real learning that can be applied and generate results for the audience will build trust and generate business."

—Liz Walz

"I like the idea of a resource page for speakers (since all of ours are remote and global)."

—Elaine Gudmunsen

"We want to start using 2- to 3-minute video nuggets for our community."

—Roy Atkinson

## TRACEY STEINER

*Senior Vice President, Education & Training, National Rural Electric Cooperative Association (NRECA)*

Tracey Steiner has been with NRECA since 1992, serving in a variety of roles that included seven years in Communications and Marketing positions and 15 years as an attorney in Government Relations. In March 2012, Tracey moved to Education & Training, where she put her cooperative governance and public policy background, along with research, writing, and editing skills, to work in new ways. She views her current role as primarily two-fold: (1) aligning the department around a vision that promotes lifelong learning for NRECA's members as the key to their success and (2) ensuring her team has the resources, cooperation, and support from across the association necessary to deliver impactful learning for NRECA members.

Tracey enjoys cooking, gardening, reading, travel, and just being outdoors. As a University of Maryland alum (her undergraduate degree is in journalism), she is a big fan of Maryland Terrapins basketball.



**What does it mean to you to be in the learning business?**

**“For me it was the realization that we needed to think about our portfolio of education programs like a business thinks about managing a product line. This meant ensuring that we had all the critical components in place—including a lot more deliberate focus on marketing and selling.”**

*—Tracey Steiner*



## JEANNE HEATON

*Director of Continuing Legal Education, Illinois State Bar Association (ISBA)*

Jeanne Heaton serves as the director of continuing legal education (CLE) for the Illinois State Bar Association (ISBA), where she oversees the live and online CLE programming. Jeanne managed the transition to add online CLE in 2007, which is now the delivery format preferred by members. She works with the Committee on CLE, the Solo Small Firm Practice Conference Planning Committee, the Minority Bar CLE Planning Committee, more than 50 volunteer member attorney CLE coordinators, and more than 650 volunteer faculty members annually. Jeanne works with CLE committee and staff to plan and provide annual training programs for the volunteer faculty in addition to curating a wealth of faculty web resources. Jeanne and her CLE team of six administer more than 75 annual live on-site programs, 50 annual Webinars/Webcasts, and a catalog of more than 400 hours of CLE content. Additionally, she oversees the administration of the short Quick Takes for Your Practice video series and serves as a senior management team member of the ISBA Communications group. She liaisons to other organizations in the state to coordinate CLE initiatives, including the IL Supreme Court Commission on Professionalism, the ARDC, the IL Judges Association, and numerous minority bar associations.



Jeanne is also active in the International Association for CLE Professionals, ACLEA, serving as president in 2017-18, after serving as president elect, secretary, treasurer, and director on the ACLEA Executive Committee. She currently serves as co-chair of the State and Provincial Bar SIG. Previously she served as MCLE Committee co-chair, Executive Leadership SIG co-chair, and as a member of two conference planning committees.

Before entering the world of CLE, Jeanne worked as an environmental lawyer. She earned her JD degree from Indiana University Maurer School of Law-Bloomington and her undergraduate degree in Political Science, Phi Beta Kappa, from the University of Illinois-Champaign. She enjoys traveling and spending time with her four children and five grandchildren.



**What does it mean to you to be in the learning business?**

**“For me, being in the learning business means job satisfaction and purpose.”**

*— Jeanne Heaton*

# USING DATA TO YOUR COMPETITIVE ADVANTAGE: A CAUTIONARY TALE AND CASE STUDIES

// Leslie Katz & Jack Coursen //

## A KEY TAKEAWAY

There's value in being curious, it's important to ask questions, and research can open up opportunities for your learning business, ensuring that your competition doesn't get there first. Ignoring vital pieces of information comes with an opportunity cost.

## WHY THIS IS IMPORTANT

So many of us don't take the time to step back to scan and plan, causing implementation efforts to be lackluster at best. It's much more effective to use data-based decision making to ensure you're on the right track and not ignoring important factors that could be keys to success. If you're not asking questions, you'll never know what opportunities you're missing, and you leave the door open for your competition to move in.

## HOW TO USE THIS

Take time everyday to ask "why" questions and find out what you need to do to get your questions answered. Is it a customer churn analysis? Is it a pricing study (maybe using the Van Westendorp pricing sensitivity meter)? Whatever it is, you'll find ways to improve your learning business when you have a culture of curiosity.

## THE RESULT

Results may include decreased customer churn, increased revenue growth, and confidence about your pricing. Being curious about your learning business can help overcome challenges and reveal hidden opportunities, whatever your key business objectives are.



## LESLIE KATZ

*Marketing Director, American Speech-Language-Hearing Association (ASHA)*

Leslie Katz is the marketing director at the American Speech-Language-Hearing Association (ASHA). During her 15-year tenure, she has overseen marketing and strategy for products and services to meet the professional needs of audiologists and speech-language pathologists. A central focus is her work with the team responsible for ASHA's continuing education brand, ASHA Professional Development. Her passion for data-driven decision-making has led to many innovative initiatives that have increased non-dues revenue for the association. More recently, her work on a comprehensive pricing study for ASHA Professional Development drove a new short- and long-term strategy for the business.

Prior to ASHA, Leslie was a senior manager in consumer markets at MCI and in brand management at the Quaker Oats Company, responsible for new frozen snacks and Gatorade. Leslie holds an MBA from Washington University and a BA from Tufts University.



**What does it mean to you to be in the learning business?**

**“For me, learning is empowerment. Learning provides you with the confidence you need to move forward and enjoy life. And from a professional standpoint, as learning businesses, we have to keep on top of trends, stay ahead of the technology, and bring meaningful learning to our members.”**

*—Leslie Katz*



## JACK COURSEN

*Director for Professional Development, American Speech-Language-Hearing Association (ASHA)*

Jack Coursen is the director for professional development at the American Speech-Language-Hearing Association (ASHA). He has worked in the association learning business field for 15 years, with a passion for member impact, non-dues revenue, and strategic influence in continuing education.



**What does it mean to you to be in the learning business?**

**“A learning business provides so many challenges and opportunities. If you’re a curious person, it’s a gold mine. I can say without hesitation that I’m doing the best work of my life.”**

*—Jack Coursen*

# ALIGNING CAREER PATHS WITH AN EMERGING TALENT POOL

// Veronica Diaz //

## A KEY TAKEAWAY

A pathways initiative can help your organization in content planning and serving learners.

## WHY THIS IS IMPORTANT

Career, competency, content, and credential pathways represent an innovative way to support learning and growth and also support the value proposition of learning businesses.

“The four different types of pathways was interesting! I was thinking there was only one way.”  
—Ashley Rapone

## HOW TO USE THIS

Learners are often unclear about how to advance their professional goals, and pathways can add structure to that process, helping your learning business stand out.

## THE RESULT

Learning businesses that have successful pathways initiatives can align their learning programs with their content plans while assisting their audience in finding their way through all the rich opportunities and experiences they offer.

“We’ve been talking about pathways for a while but have been challenged with how to account for the fact that many of our participants are in small businesses, wearing multiple hats, so a clear career progression within one field may not be possible. So, proficiency levels and showing how competencies translate across jobs is helpful.”

—Tracey Steiner



## VERONICA DIAZ

*Director, Professional Learning, EDUCAUSE*

Veronica Diaz has over 12 years of experience supporting faculty and teaching and learning programs in higher education, as well as 10 years of experience supporting adult professional learning in associations.

Currently, she serves as the director of professional learning at EDUCAUSE and ensures that learning and development programs support and advance the overall strategic priorities of the professional learning, member communities, and research teams. She supports member needs with excellence in program design and development, program delivery, and program evaluation.

Veronica advises senior leaders on methods for improving or enhancing member engagement and aligning services with member needs. She is responsible for contributing to the strategic management of the professional learning product portfolio serving over 2,000 higher education institutions in the US and abroad, along with corporate and not-for-profit associations, building and coordinating with partners to create new learning programs, and providing operational oversight for existing programs.

Veronica also supports the association's online programs, which currently serve over 10,000 members annually. She leads face-to-face events and conference-based learning experiences and manages the EDUCAUSE microcredentialing program and virtual and place-based mentoring programs.



**What does it mean to you to be in the learning business?**

**“I’ve been in the learning business my entire career, and I love it because it’s the opportunity to bring together many different skill sets and to learn new things. To me, it means being able to stay fresh, current, and apply new skills—all to try to bring people more joy in what they do every day.”**

*—Veronica Diaz*

# ADDING VALUE THROUGH STRATEGIC COORDINATION OF LIVE IN-PERSON TRAINING AND ONLINE TRAINING

// Elisabeth Rocha & Suzanne Dennis //

## A KEY TAKEAWAY

Strategic collaboration between the planning of live in-person and online educational programs can result in benefits for the learner *and* for the organization.

## WHY THIS IS IMPORTANT

In many organizations (including ours), live in-person seminars are completely separate from online educational opportunities, such as Webinars and recorded content. That is an outdated model that misses opportunities for both the learner and the organization.

## HOW TO USE THIS

We encourage you to think creatively about how different learning formats can effectively complement each other.

## THE RESULT

The program attendee may experience increased learning, and the organization may see increased revenue for both live in-person and online learning opportunities.

“Anonymous questions for in-person events is a brilliant idea!”

—Anna Woods

“Our leadership is fearful that doing more digital education will lead to less people attending in-person events.”

—Cristyn Johnson

“@Cristyn, ours too, but so far we haven’t seen cannibalization of face-to-face.”

—Jen Lewi

## ELISABETH ROCHA

*Manager of Online Learning, Illinois Institute for Continuing Legal Education (IICLE)*



Elisabeth M. Rocha is a workforce development professional who works with Illinois lawyers and subject matter experts to develop an innovative approach to continuing legal education in Illinois. Elisabeth is currently the manager of online learning at IICLE.

Elisabeth believes that building training programs that validate industry competency and compliance while engaging the learner are the keys to successful online learning.

She developed a nationally recognized program to assist the Department of Defense and reduce costs associated with unemployment during one of the largest military drawdowns in history by engaging exiting military members with skills and resources to explore and develop career options.

Her work with the Northwest Edge resulted in the Washington State Office of Financial Management receiving the Eugene H. Rooney, Jr. Innovative Program Award in 2015 from the National Association of State Personnel Executives.

Elisabeth holds a bachelor's degree in Workforce Education and Development from Southern Illinois University and a master's degree in Adult Education and Training from the University of Phoenix.

**What does it mean to you to be in the learning business?**

**"I'm a lifelong learner, so being able to help other people learn things that help them do their job better is super valuable and gives me pride."**

*—Elisabeth Rocha*

## SUZANNE DENNIS

*Program Attorney, Illinois Institute for Continuing Legal Education (IICLE)*

Suzanne Dennis is a program attorney at the Illinois Institute for Continuing Legal Education, where she plans all of the Institute's live in-person programs. Before joining IICLE®, Suzanne served as an assistant professor of Legal Studies at the University of Illinois at Springfield and an assistant attorney general for the State of Illinois in the General Law Bureau, defending state employees in civil litigation.

When not planning MCLE (minimum continuing legal education) programs, Suzanne enjoys drinking wine, singing karaoke, and hanging out with her teenaged children and her maltichon puppy, Lacey.



**What does it mean to you to be in the learning business?**



**“Helping learners keep on the cutting edge as far as their skills and knowledge go. I really enjoy making learning as practical and engaging as possible.”**

*— Suzanne Dennis*

# audio intelligence for learning leaders



The Leading Learning Podcast is the *only* podcast created specifically for leaders and aspiring leaders in the business of lifelong learning, continuing education, and professional development.

Each week we offer actionable insights based on our extensive experience working with and in learning businesses and on conversations with a wide range of experts and organizational leaders, including featured LTD 2020 speakers Ray Schroeder, Connie Malamed, Tony Paille, and Rachel Happe.

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 [leadinglearning.com/podcast](http://leadinglearning.com/podcast)





# EMPOWERING LEARNING THROUGH ENGAGEMENT AND COMMUNITY BUILDING

// Rachel Happe //

## A KEY TAKEAWAY

Communities optimize learning with a web of relationships, creating just-in-time access to validation, empathy, support, and challenge.

## WHY THIS IS IMPORTANT

A perfect storm of technology currents and social currents has made tightly controlled, centralized knowledge distribution too slow or even obsolete in many situations.

## HOW TO USE THIS

Communities succeed when the organization hosting the community and the community members have a compelling shared purpose and create shared value.

## THE RESULT

Communities empower individuals, resulting in high engagement rates, and a community's value can be measured through ROI.

“Control is for amateurs.  
**Trust** is for professionals.”

—*Rachel Happe*



## RACHEL HAPPE

*Principal & Co-Founder, The Community Roundtable*



Rachel Happe (@rhappe) is a co-founder and principal at The Community Roundtable, a company dedicated to advancing the business of community. The Community Roundtable collaborates with clients to develop proven, practical strategies for better engagement. Clients rely on The Community Roundtable's models, research, and networks to take their communities to the next level. Rachel co-founded The Community Roundtable to support business leaders developing their community, collaboration, and engagement strategies. Clients, including AMEX City Year, AAAS, EA, Ciena, the Canadian Medical Association, and the World Bank, benefit from Rachel's ability to make sense of abstract trends and her ability to see the implications that technical and operational decisions can have on people and processes.

Rachel has over 25 years of experience working with emerging technologies, including enterprise social networking, e-commerce, and enterprise software applications. Rachel has served as a product executive at Mzinga, Bitpass, and IDE and as IDC's first analyst covering social technologies. She started her business career as an analyst at PRTM.



**What do you think the most critical thing anyone who wants to support lifelong learners needs to be thinking about right now?**

**“Supporting people’s ability to bring their whole self to work. It’s really hard to learn if you’re stressed. If people feel controlled, they won’t learn, and learning is a joyful thing. If you’re not allowing people to be their full selves, it’s going to be really hard to get them to learn quickly.”**

*—Rachel Happe*

## CONCLUSION

In the concluding synthesis session for LTD 2020, we reference Russian author Anton Chekhov, who said, “Knowledge is of no value unless you put it into practice.” We sincerely hope that you will put the perspectives and insights shared in this resource into practice.

To add to the value of this document, we encourage you to join us in the Leading Learning Connective by going to <https://learn.leadinglearning.com/join>. By joining you gain access to the recordings and slides for each LTD 2020 session. Perhaps more importantly, you’ll gain access there to a community of other learning business professionals through forums where you can ask questions and provide your own perspectives and insights on topics related to LTD 2020 and the learning business in general. And we’ll personally play an active role in discussions, weighing in with what we have to offer from our years working in and for learning businesses.

We hope you have found this resource valuable. Please don’t hesitate to [reach out to us if we can be of help](#) in any way. ▶◀



*Jeff & Celisa*



# THE Leading Learning CONNECTIVE



1

## **CONSULTATIVE EXPERTISE**

The Connective is an initiative of Tagoras, a firm that has consulted with organizations in the business of continuing education, professional development, and lifelong learning for well over a decade. As a member of the Connective, you can engage directly with Tagoras principals Jeff Cobb and Celisa Steele and tap their expertise and experience in launching and growing multiple learning businesses and researching and writing extensively on related topics.

2

## **COMMUNITY OF PRACTICE**

Members of the Connective are learning business professionals with significant knowledge and experience. The ability to engage with other members, ask questions, and share insight, tips, and best practices represents value that simply can't be found anywhere else.

3

## **BODY OF CONTENT**

The Connective is where all the recordings from past Learning • Technology • Design virtual conferences are hosted, along with recordings from a range of Leading Learning Webinars. Valuable knowledge is also shared through uploaded resources and the discussion forums. Strong search capabilities make it possible for you to find content in the topic areas most important to you.

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