Symantec LearningExchange: Creating and Sharing Informal Training Content Across the Enterprise

Stacey Harris, Vice President of Research and Advisory Services, Brandon Hall Group
June, 2012
Best Results of a Learning Program

Company Background

Symantec, 2012

Symantec Corporation is one of the world's largest software companies with more than 17,500 employees in more than 40 countries. Symantec Education & Enablement Services (SEES) is the department within Symantec responsible for the development and delivery of technical education for internal employees, partners, and external customers on how to use Symantec enterprise software products. SEES provides a portfolio of education products, including instructor-led training, virtual live webcast training with remote hands-on labs, self-paced web-based training, and on-demand video-based instructor-led training.

Company At-a-Glance	
Headquarters	Mountain View, CA
Year Founded	1982
Revenue	$6.19 billion
Employees	18,600
Global Scale	International
Customers/OutPut, etc.	Approximately two-thirds of the company's revenue is derived from software designed for companies and large organizations
Stock Symbol or Private	SYMC (NASDQ)
Web site	www.symantec.com

Business Conditions

SEES employs a team of professional instructional designers, curriculum developers, and technical lab developers who produce Symantec's formal technical product training. Back in

2009, after organizational changes and department restructuring, interviews were conducted with internal stakeholders and members of the internal target audiences to better understand training needs in order to improve the way in which the formal technical training curriculum was developed. While people said they were satisfied with Symantec's formal curriculum, something unexpected was revealed through these discussions: employees throughout the company were developing quite a bit of informal, ad hoc training outside of their department to meet the needs of their specific teams or job roles.

Why were people creating informal content -- was there something lacking in the formal curriculum offered by Symantec? The answer was "Yes." Symantec's formal curriculum covers the key areas of product installation, configuration, deployment, management, administration, maintenance, and troubleshooting. The audience for the formal training is broad and includes all internal and partner technical audiences (system engineers, technical support engineers, and consultants) as well as customers (typically system administrators) who install, administer, and troubleshoot the products in customer environments. Because the formal curriculum is aimed at this broad audience, the examples, scenarios, and labs within the formal curriculum typically include scenarios that apply to the majority of customers. What the formal curriculum was lacking was some of the unique or less common examples, procedures, and best practices that did not apply to "most" customers.

Upon further discussion with employees, all agreed that while this information was lacking in Symantec's formal training, it did not really belong in the formal curriculum. However, it was useful to have this informal training as a supplement or follow-on to the formal curriculum, depending on the specific job role. For example, sales engineers needed the additional best practices and guidelines for handling unique customer scenarios; and technical support engineers needed additional advanced troubleshooting guidelines for handling unique issues in less common customer environments.

Employees were creating this informal content on an ad hoc basis to document these unique scenarios and best practices for others within their teams. The content was often stored locally on an individual's laptop, e-mailed around to team members, or stored on a local server accessible only to that team. This informal content was not part of our formal curriculum, so it was not available in our globally accessible learning management system (LMS). In general this informal training content lay hidden, and other teams who might benefit from the information would never find it.

Symantec began to collect and review some of this informal training content. While some of the content was not necessarily useful outside of that team, it was determined that much of it was quite good and would be useful to others outside of that team and across departments. Furthermore, it was found that some of this informal training content provided specific

examples or use cases that could be enhanced and incorporated into the formal curriculum within real-world examples and lab scenarios.

Most of this informal training content was in the format of PowerPoint presentations and Word documents. Some of the content creators had obtained our formal education PowerPoint or Word templates and had modeled their content after our formal training; some had even included learning objectives. Other content was less polished, but still contained excellent information that was being used to expand the knowledge and skills of the target learners.

In talking with the creators of this informal content, pride of ownership by the individuals who had created this informal content was found. They had taken the time to document their special knowledge and enjoyed sharing it with their peers; it was a showcase of their expertise. They planned to continue updating their content as they gained new information. Although they were happy to provide the content to the Education team to use, they were not interested in posting their content in the learning management system, as doing so would create a barrier to their ability to quickly update and revise their content. They wanted to continue maintaining their informal content in an ad hoc way.

Furthermore, Symantec found that many of these content owners were interested in the Education templates, tools, and development processes, and they asked for guidance on how they could improve their content.

Case Study Outcomes

Overall, the Symantec LearningExchange has been very effective in meeting the goals of the program which include the opportunity to:

- Create a place where anyone in the company could store their informal training content so that it could be shared with and accessed by everyone in the company.
- Develop an interface around this informal training content that would enable content creators to quickly and easily upload, remove, or replace their training content; and that would enable others to easily find, navigate, and download content.
- Provide a kit of tools, templates, and guidelines that employees could use to help them build their own informal training content.

The evidence of its effectiveness to date is shown in the number of pieces of informal training content currently posted to the site (over 500) and in the steady increase of site usage (currently over 200 page hits per day). The strong usage by non-U.S. based employees indicates that the LearningExchange is meeting a need for employees located in smaller,

regional sites that do not have as much in-person contact or access to subject matter experts as those located in large sites and headquarters.

Overall, the Symantec LearningExchange is bringing visibility and accessibility to the knowledge of those subject matter experts who choose to document their knowledge for the benefit of others in the form of informal training content. As education experts, Symantec's realized that attending a formal training class or working through an interactive web-based training course is only part of the equation in enabling employees with the knowledge, skills, and experiences needed to excel in their roles at Symantec. Through the Symantec LearningExchange, a platform for instructional information that is not always captured in formal training is provided.

Program Overview

The Symantec LearningExchange was conceived as a way to capture informal training content and make it accessible to all internal employees, while allowing the originators of the content to retain ownership and ease of maintenance of the files.

Specific goals were to:

- Create a place where anyone in the company could store their informal training content so that it could be shared with and accessed by everyone in the company.
- Develop an interface around this informal training content that would enable content creators to quickly and easily upload, remove, or replace their training content; and that would enable others to easily find, navigate, and download content.
- Provide a kit of tools, templates, and guidelines that employees could use to help them build their own informal training content.

Symantec also saw this as an opportunity to harness the vast knowledge of subject matter experts throughout the company and to supplement formal curriculum with this informal training content. This program was a potential "content pipeline" for formal training development; by creating a place for people to share their content, Symantec was also capturing content that could potentially be leveraged within the formal training courses.

Considerations, constraints, and challenges included:

- A site that relies on voluntary contribution and participation needed to be easy to access and easy to use, and it needed to be accessible to everyone in the company.
- Symantec wanted it to be easy for a content creator to upload, modify/replace, or delete their content. This meant that they could not use the learning management system, which requires specific skills, tools, access, and processes to publish and post content.

- Symantec wanted it to be really easy for users to navigate, find, and download content. This meant that Symantec needed site functionality such as indexing, searching, and sorting. A simple web site/server would not provide this functionality.
- The budget for this project was $0. This meant that a new learning management system could not be purchased or a custom tool could not be built to meet this need. A tool that was already licensed in-house would be needed.
- Although some informal content was located, it was believed that there was more content to be discovered and it was not certain how much more would be discovered. A site was set up quickly to see how it would evolve before investing too much in time and resources.

A small project team of education developers was assembled to discuss options in building what was called the Symantec LearningExchange. Since there was no budget, limited resources, and Symantec wanted to build something quickly and see if it would catch on, they were determined that they would have to use a tool that was already licensed in-house, and based on the requirements that had been established, Symantec thought that they could meet most of the requirements using Microsoft SharePoint. An advisory board was also created for the project consisting of representative members of the target audiences that the LearningExchange would serve. A meeting was held with the advisory board weekly during program design and development to get their feedback on design approaches and prototypes.

The final design of the Symantec LearningExchange consisted of three main pages:

- **Create:** The "Create" page includes best practices and guidelines for content creation, including a downloadable LearningExchange Development Kit which contained education PowerPoint templates, a graphics library, and other documentation.
- **Learn:** The "Learn" page is the default landing page for the site and includes a sort-able list of all content posted in the site, and search filters that can help narrow the focus of your search.
- **Share:** The "Share" page is where a user can upload content to the site. A content owner may also delete or replace their own files on the site. A content owner can also create an entry in the LearningExchange that links to content stored elsewhere.

Although built on a standard SharePoint server site, the interface was highly customized to simplify the user experience and eliminate parts that were not necessary to perform the key tasks of Create, Learn, and Share. The next sections provide more detail and screenshots of these three main pages:

Create:

The Create page provides a link to download the LearningExchange Development Kit (LDK). This kit contains PowerPoint templates designed for training, sample course outlines, a graphics library containing conceptual icons that match the template, and documentation on recording instructions and best practices for people who develop their own training demonstrations using tools such as TechSmith Camtasia. The LDK addresses the goal of providing tools, templates, and resources to those people within the company who want to develop their own informal training content.

Figure 1:
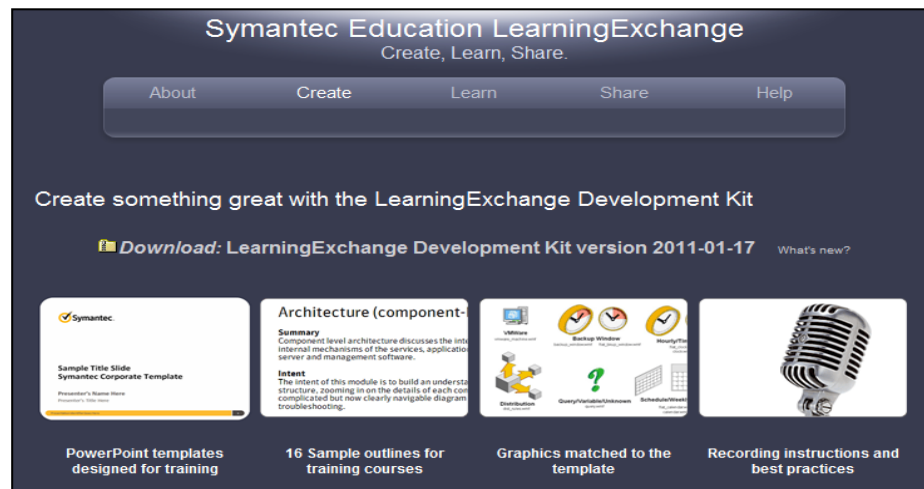
Source: Symantec, 2012.

Learn:

The Learn page is the default landing page. All content is shown on the Learn page along with simple and efficient search features. The search filters that were selected are based on the needs of the target technical audiences expected to use the site. The search filters enable you to refine your search based on Product Family, Product Name, Intended Audience (including technical support, sales engineers, consulting, etc.), and specific job tasks (such as install, configure, troubleshoot, manage, etc.). The search utilizes metadata that a content owner enters when they upload content, allowing for detailed behind-the-scenes tracking, while hiding the metadata from a user who is simply browsing for content.
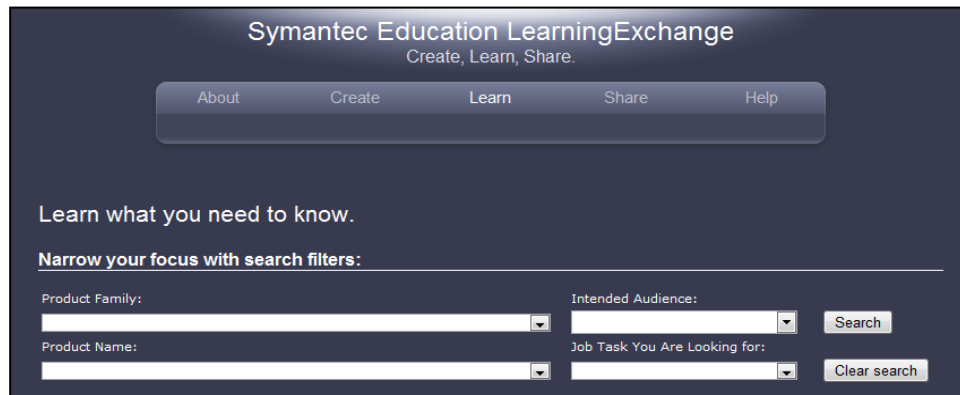
Figure 2:

Within the Learn page, content is categorized and presented in groups by software products and versions to separate content areas and help guide users to what they are looking for. At a glance, users can see the content type icon (representing Power Point presentation, Word doc, PDF, video, etc.), title of the training content, Intended Audiences (sales, technical support, etc.), length of training, name of the content creator, the date it was last modified, the size of the content, and any comments and ratings from other users. The integrated rating system allows users to judge the items usefulness and leave feedback for other users and the site administrators.

Figure 3:

After locating an item, users click the link to run the training directly from the server or they can choose to download it for local viewing.

Share:

Figure 4:

The Share page provides a quick way for content creators to upload or link content to share their informal training content with others. On the Share page are two choices: *upload new content* and *add new link*. Users may upload their content directly to the LearningExchange for hosting, or they can link to an existing URL if the content is already stored in another accessible location. With either method, as users upload content they also enter in metadata (details about the content) including the training titles, description, creator, length, technical level, intended audience, and more. The detailed information is stored in the database and helps to correctly categorize content and streamline the search process.

It was found that many content creators already had items posted on other existing and accessible internal sites, but they were having a difficult time attracting others to their informal training content. Utilizing the *add new link* function, they can link from the LearningExchange to the existing site; their content is maintained in one location, but has several different routes for users to access. This makes it easy for content owners to maintain their content on their own site, but increases the visibility of the content since it is logged in the LearningExchange.

As posted content ages, once an item is 6 months and 1 year old, content owners are notified via email and asked to review and re-validate any materials they have uploaded. When a content owner clicks on the Share page, they are shown a list of all content they have contributed to the site. From there, they can easily edit, remove, or replace outdated materials, effectively refreshing the content available to the company. They may also update the metadata at the same time to ensure the accuracy of content searches.

Figure 5:

Other Site Features:

Following the initial launch of the LearningExchange site in January 2010, Symantec added new features including:

Incorporation of Camtasia Relay: As the LearningExchange site was being built, a separate project was underway to implement a Symantec-wide site license for Camtasia Relay. Camtasia Relay is an easy-to-use recording tool that allows Symantec employees to capture and produce their own on-demand training and has the flexibility to record in multiple formats. Using Camtasia Relay, anyone in the company can capture a live demo, PowerPoint presentation, or audio recording in a matter of minutes. When they are finished recording and editing their informal training, Camtasia Relay automatically publishes the training in a pre-defined format for online viewing. The published course is placed in a network share and the user is notified of the share location and URL to launch the training. Users may then copy the URL into a LearningExchange entry using the *add new link* feature on the Share page. A link was added to the Camtasia Relay tool within the Create page of the LearningExchange, documentation on using Camtasia Relay into the LearningExchange Development Kit was also added.

Interactive "Introduction to the LearningExchange" training module: A short, interactive introduction to the LearningExchange was built to help in promoting the features of the site and how to use them. This short eLearning tutorial describes the goals and features of the LearningExchange, provides information on how to get started with each of the main pages, and includes direct links to each of the pages of the site.

Figure 6:

Change Management Efforts

The Symantec LearningExchange was designed as a place to capture informal training content and make it easy for anyone within the company to share their informal training content with others. Because this is a site for sharing informal training content, the content is not "policed" for instructional value nor is any formal evaluation of whether the content contributed to increasing a learner's knowledge or performance. These types of measurements are reserved for formal training that is accessed through the learning management system. However, a "Rating" feature was implemented to allow users to rate the content on a five-star scale as a means of providing feedback on the usefulness of the content to the content owners and other users.

Measureable Benefits

The primary metric that are monitored to measure the usefulness and benefit of the LearningExchange to the company is site usage:

- Are people contributing informal content to the site?
- Are people coming to the site to find and download content?

To date, more than 500 pieces of informal training content have been added to the site. The site launched in January 2010, so it has been in place now for nearly one year and four months. That's one new piece of informal training content per day, every day, completely outside of formal training content.

Adoption and usage of the site has shown steady, consistent growth over the past year. On average, there are over 200 page visits per day, with more and more of them from distinct users. The following data shows the number of page visits (requests) for the past 30 days:

Figure 7:
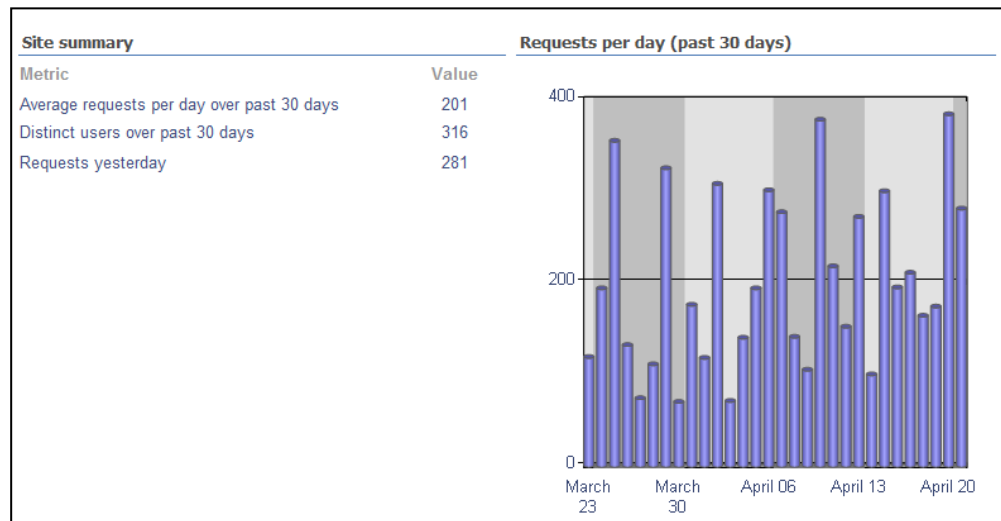
Source: Symantec, 2012.

Repeat usage of the site is high, especially for non-US based employees. International usage has been surprisingly strong with employees using the site to share content with the broader global company. No longer are they required to email large file attachments to groups of people or rely on FTP or other file shares. As the site continues to grow, there are additional tracking and reporting features that may be implemented.

This usage data suggests that employees are finding value in the site, more and more users are discovering the site, and employees are continuing to contribute content to the site.

Efficiencies can be inferred from the fact that employees now have a place to house their informal training content that is accessible to all employees. Content owners no longer have to email large file attachments around to requestors or waste time managing server access permissions for files stored on department file shares or FTP sites. Users looking for a piece of content that a peer told them about no longer have to hunt down the creator or try to locate a regional server; they can come to the LearningExchange to find what they need quickly.

For the curriculum developers working on formal training content, the LearningExchange has become a new resource for gathering content to use in building formal training. Not only does the LearningExchange provide some raw source content, it also provides the names of subject matter experts (content owners) that they may contact during their research and design of formal training.

Future Plans and Next Steps

In the coming year, plans to continue to promote the site to increase awareness, refine and evolve the LearningExchange Development Kit, and survey users and content contributors for their feedback on the site. Steps to continue to find ways to enhance the usability and usefulness of the site are underway.

About Brandon Hall Group

With more than 10,000 clients globally and 20 years of delivering world class research and advisory services, Brandon Hall Group is the most established and well-known research organization in the performance improvement industry. We conduct research that drives performance and provides strategic insight for executives and practitioners responsible for growth and business results.

Brandon Hall Group has an extensive repository of thought leadership research and expertise in our primary research portfolios— Learning and Development, Talent Management, Sales Effectiveness, Marketing Impact, and Executive Management.

At the core of our offerings is a Membership Program that combines research, benchmarking, and unlimited access to data and analysts. Our members have access to research and connections that help them make the right decisions about people, processes, and systems, coalesced with analyst advisory services tailored to help put the research into daily action.

The Value of Membership

The Brandon Hall Group Membership Program encompasses comprehensive research resources and an array of advisory services. Our Membership Program provides:

- **Cutting-Edge Information** – Our rigorous approach for conducting research is constantly evolving and up-to-date, providing your organization with current and future trends, as well as practical research insights.
- **Actionable Research** – Your membership includes advisory services and tools that are research driven and provide you a breakthrough approach to addressing immediate challenges and opportunities inside your organization.
- **Customizable Support** – Whether you are an executive or entry-level practitioner our research and analyst insights can be leveraged at an individual level and across the entire organization. We realize that every organization has unique needs, so we provide multiple analyst and research access points.
- **Community of Peers** – We realize the value of connecting with your peers and being part of a community that is focused on continuous improvement. Your membership provides you with personal connections to fellow professionals.
- **Unlimited Access** – Every member of your team has the ability to utilize research, best practices, and advisory services when they need it most.

To learn more about Brandon Hall Group, please call us at (561) 865-5017 or email us at success@brandonhall.com.