

July 21, 2008

The eLearning Guild's
LEARNING SOLUTIONSSM

Practical Applications of Technology for Learning e-Magazine

THIS WEEK: Management Strategies

Sales Quenchers Case Study: Delivering Learning Nuggets by Smartphone

By Robert Gadd

Sales Quenchers is a North Palm Beach, Florida-based sales training organization that has a successful business providing just-in-time reference materials to organizations. The company publishes physical, pocket-sized sales training content, packaged in a traditional “playing card” or “flash card” deck.

These cards, known as Mem-Cards™, distill the core concepts and key techniques of leading sales experts like Jeffrey Gitomer, Brian Tracy, Zig Ziglar, and others. The result is easy-to-carry, easy to consume educational moments for on-the-go sales professionals. Each card presents a salient sales lesson, and a quote to crystallize the lesson's core concept. For busy salespeople, Mem-Cards help them learn and cultivate new skills they can apply while selling. Mem-Cards is a novel way to motivate and up-skill sales teams, without being meddlesome or breaking the bank.

Despite these advantages, there are some shortcomings to this distribution model:

- The physical cards cannot be updated without reprinting or republishing
- There no mechanism for publishing time-sensitive content
- There's no way to track or measure whether people are using the cards
- Many next-generation employees consider using physical cards dated.

Sales Quenchers goes digital

Sales Quenchers decided to overcome these limitations. By converting from printed cards to digital format, they would revolutionize their approach. In addition, this would make their knowledge nuggets mobile learning-

Sales training organization Sales Quenchers decided to deliver its just-in-time reference and teaching materials via the one device that every sales person has mastered: the mobile phone. This week, learn about the benefits for the company and its customers, how Sales Quenchers selected a platform, and the measurable results and outcomes, including costs and implementation time.

A publication of



ready. They could offer a flexible subscription model, and deliver their content to customers via cell phone, PDA, or PC.

This change would also provide important benefits for Sales Quenchers' customers. First, they would be able to plan "learning campaigns," and schedule content delivery based on management objectives. They would have a means to track completion of assignments, and measure retention of information. Any supervisor could create and distribute custom content to their workforce. And customers could accomplish all of this using the mobile device that their employees already had and knew how to use – a mobile phone.

Sales Quenchers' digital initiative opened up a whole new world of flexible rich-media formats. Customers could access professionally recorded audio content (Podcasts), graphic-intensive e-mail blasts, and even portable versions of popular content. While mobile devices are the ideal method for scheduled content delivery, subscribers can receive content by e-mail blast or as an Adobe PDF document, from any Internet-connected PC. This level of flexibility extends beyond the learner's own delivery choices. Managers also can customize system-level options. Customers can select the personal development

and sales Learning Nuggets they want from the library of pre-recorded content, and combine their choices with content they create themselves. Many of Sales Quenchers signed authors now record their own Learning Nuggets, delivering their ideas in their own voices. For the mobile workforce, the effect of hearing valuable, actionable ideas directly from their authors has proven extremely powerful.

These changes make Sales Quenchers' delivery model stand out from offerings available from traditional sales content providers and publishing competitors. It is unique, and adds value to the content. As a result, mobile learning is driving larger and broader sales into both current and new markets and sales channels for Sales Quenchers. Let's look at how they did it.

Sales Quenchers' delivery platform

Transforming their content from analog to digital was the first step of Sales Quencher's evolution process. Fast, efficient, and cost-effective delivery of these new digital assets also required new thinking and online methods. These methods affected everything from purchase of the content to its assignment, tracking, and management. Sales Quenchers requirements for their new Delivery Platform included:

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Management Strategies

- Integrated support for new customer and learner subscription and enrollment using e-commerce features and self-registration tools;
- Proven strategies for content packaging, scheduling, and distribution to any user or learner, based on their unique mobile device(s), geography, time zone, and delivery preferences;
- Easy-to-use tools for creating and deploying interactive tests and surveys;
- Simple-to-learn tools for content creation (audio, e-mail, or message-based) for rank-and-file managers and subject matter experts;
- Detailed content tracking, reporting, and analysis of all online and offline results;
- Comprehensive billing and chargeback reports that allocate all direct and indirect costs to specific Sales Quenchers customers per their utilization;
- Easy-to-learn and easy-to-use tools that facilitate customer-created supplemental content, using a standard telephone or cellphone that can be assigned and tracked; and
- Integration with other popular third party systems like Learning Management Systems or Learning Content Management Systems (LMS/LCMS) and Customer Relationship Management Systems (CRM) as needed.

Sales Quenchers found a readily available mobile content and communications platform to address these requirements. CellCast Solution, from OnPoint

Digital in Savannah, Georgia USA, is a fully integrated mobile content creation, delivery, and tracking platform. It supports mobile learning and information delivery initiatives, using essentially any telephone equipped with touchtone dialing. CellCast-based solutions provide mobile learning support across varied markets. Past projects include implementations in retail, financial services, transportation, technology, energy, and pharmaceutical organizations. Any organization with a highly distributed workforce armed with cell phones (personal or company owned) is a good candidate. Figure 1 on page 4 shows Sales Quenchers' delivery architecture.

Sales Quenchers subscription plans

Anyone, from independent sales professionals to large, multinational sales organizations, can purchase Sales Quenchers' digital content offerings. Every subscriber can select their preferred delivery methods based on the plan they choose. The choices available on a monthly or annual basis are:

- **Basic Subscription** – For sales professionals who prefer their scheduled content delivered in a readable format. Subscribers also have unlimited access via toll call to CellCast content, using a call-in/pull access model.
- **Premium Subscription** – For on-the-go sales professionals who prefer to access their daily assignments using their cell phone. All they need is a voice

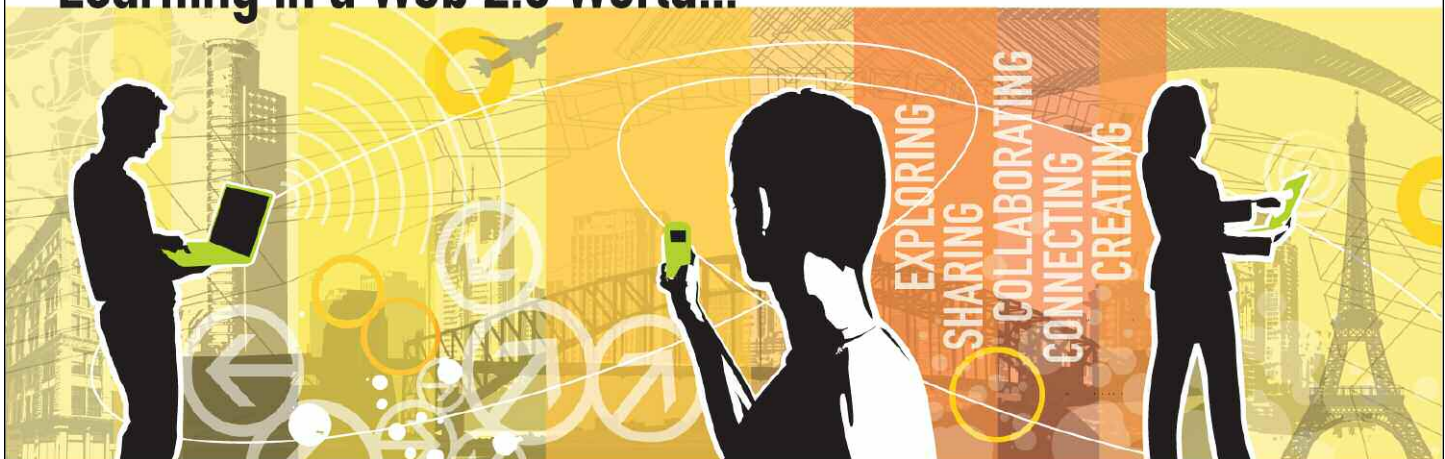
From an Assessment Summary, managers can review learner answers to any test or survey question. Audio responses to an open-ended question display a media strip, so a manager can play back the recorded response.

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plan and text messaging. Subscribers can elect to have their daily one- to two-minute Cell-Cast broadcasts delivered at a specific time. They also have the option to receive an SMS message with an embedded phone hyperlink that launches their assignment whenever they're ready (see Figure 2). All audio-based CellCasts include one or two interactive questions, or open-ended survey questions, to measure knowledge retention and gather real-time feedback.

• **Premium Plus Subscription** – For sales teams wishing to combine Sales Quenchers' Master Library and scheduled training delivery with their own just-in-time training and information. Their own managers or SMEs record the team's content. The system can deliver this combined content any time to any mobile device.

The mobile learning experience

Content delivery to a Sales Quenchers subscriber follows this process:

1. CellCast pushes daily content to the subscriber, based on their delivery preference. The content may arrive as a broadcasted call to their cell phone (or landline) that plays automatically. It can also come as an SMS/text message informing the subscriber that the daily assignment is available whenever the subscriber has free time.
2. After connecting, subscribers control playback using their phone's numeric keypad. Choices include pause/restart, backward, and fast forward. Leaving a CellCast before completing it automatically places a bookmark, so the user can resume the session from that place when they return.
3. Subscribers answer any included tests or survey questions by pressing specified keys, or speaking their answers into their phone. The system records all responses in the CellCast database. For an additional fee, CellCast can transcribe spoken comments into search text or content when required. If test scores are important, subscribers can receive immediate feedback via e-mail, SMS, or spoken word grading or confirmation.
4. Subscribers can rate any content they've completed. ComCast combines each subscriber's ratings with those of other subscribers. This is a social networking aspect of the Sales Quenchers experience.
5. Subscribers can define and access playlists and favorites, using an online portal interface.
6. The system facilitates just-in-time learning, with search methods and tools integrated into the portal platform. Premium Plus subscribers also have optional Mobile Widget interfaces available. Mobile users can search through published content by

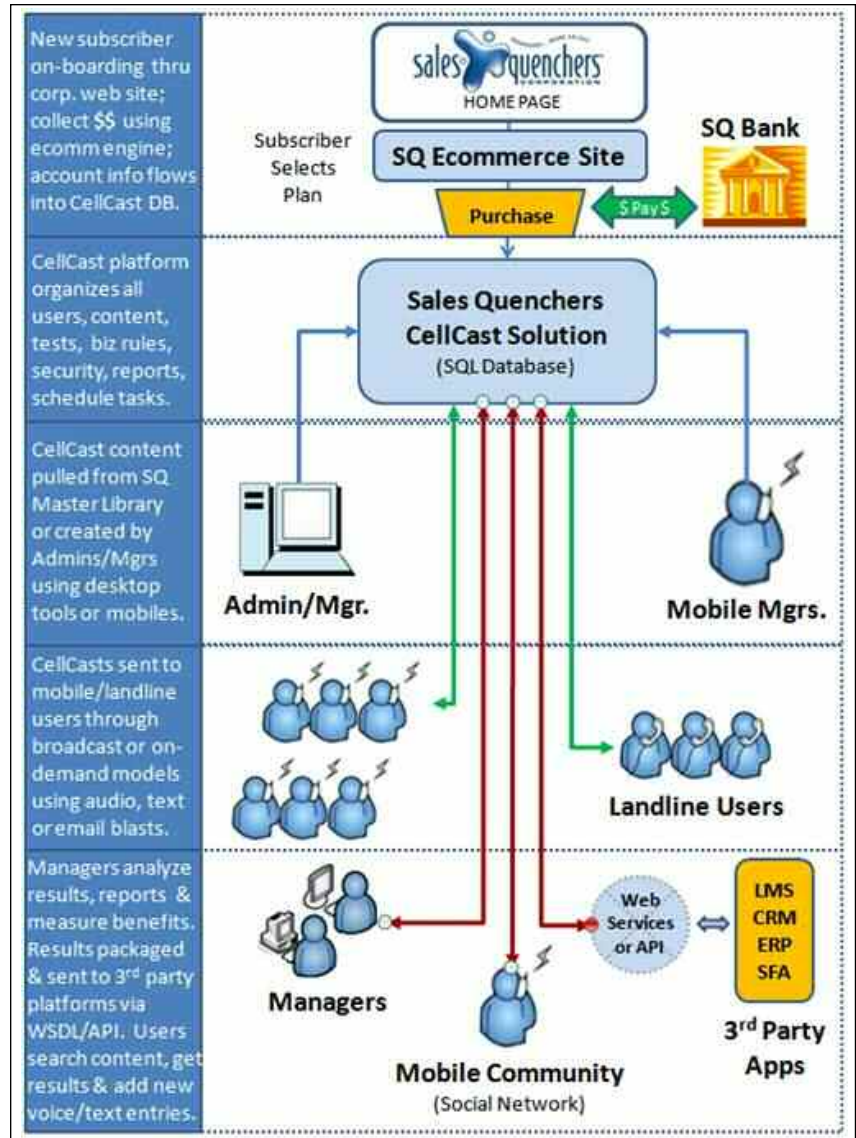


Figure 1 The Delivery Architecture for Sales Quenchers

Figure 2 Optional SMS message detailing on-demand assignment



keyword, by category, or even by rating.

7. Finally, select managers and users can receive authorization to record and distribute their own audio or message-based content using their mobile devices. This ensures that content is fresh and timely.

Tracking and analysis benefits

Any manager, supervisor, or higher-level administrator can access, review, and analyze the collective results at any time. CellCast call tracking is also very precise. It records time and frequency statistics for every interaction. This is an improvement over the generalized results experienced when distributing Podcasts. (See Figure 3.)

From an Assessment Summary, managers can review learner answers to any test or survey question. (See Figure 4.) Audio responses to an open-ended question display a media strip, so a manager can play back the recorded response.

Finally, customer managers and site administrators have fast access to more than 20 standard reports that provide summary or detailed information. They have access to call completion rates, best and worst performers, best and worst test scorers, top content contributors, monthly billing reports, collective survey results and/or responses, and more. (See Figure 5 on page 6.)

Systems management features


Sales Quenchers' use of CellCast went beyond just an authoring and delivery tool for mobile content and communications. In fact, a variety of systems management features make the platform not only unique and powerful, but also address other management concerns:

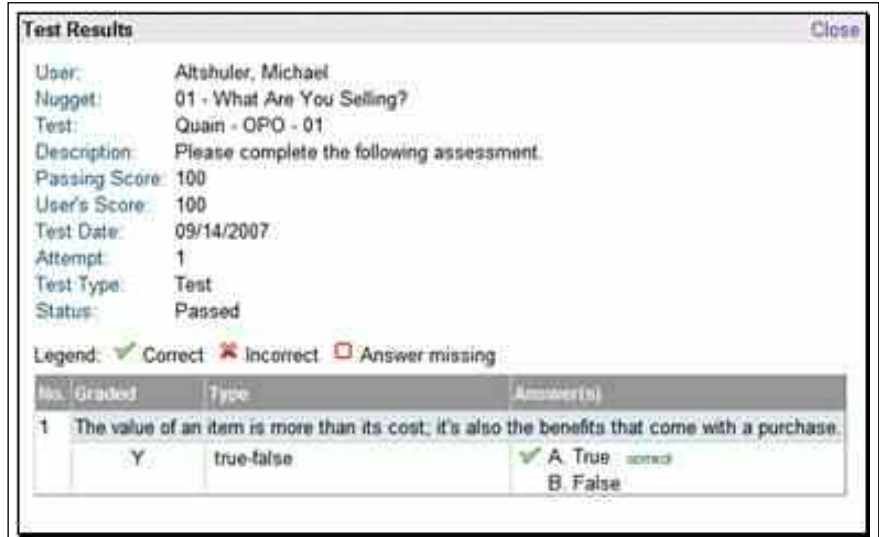
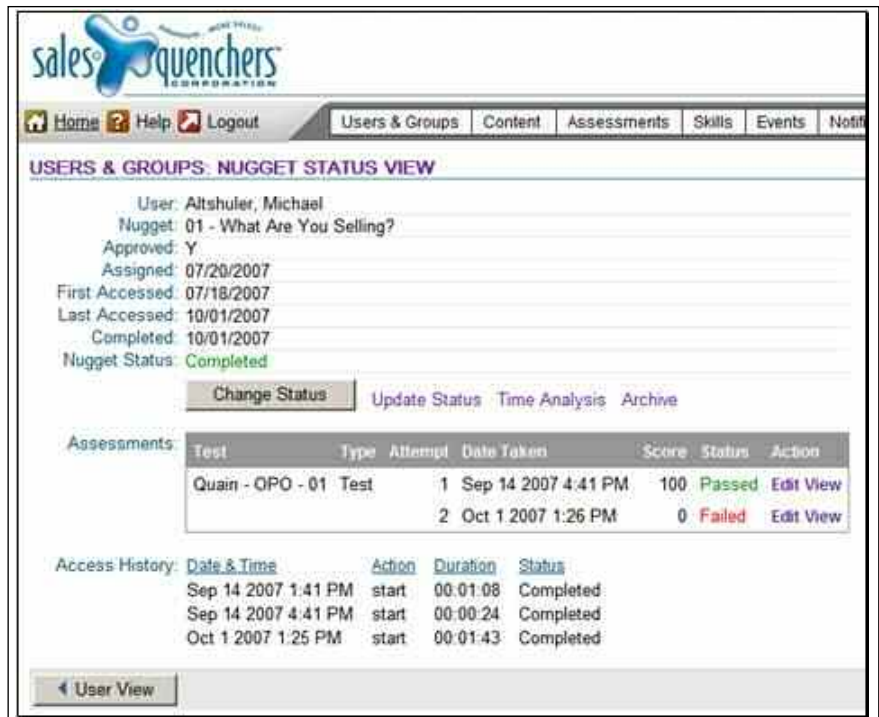
• **Mobile Profiles for Mobile Users** – Knowing who has what kind of mobile device – and each device's unique capabilities – is essential to Sales Quenchers when planning how to package and deliver digital content to that subscriber. The CellCast platform collects and manages wireless device and carrier-specific information for every defined subscriber, simplifying making, tracking, and delivery of assignments to any device anywhere in the world (see Figure 6 on page 6).

• **Automated Triggers and Business Rules** – The CellCast platform allows Sales Quenchers and their customer managers to define and implement business rules that automate internal reporting, work flows, and assignments. For instance, completion of a scheduled CellCast can trigger other assignments. It can also trigger automatic generation of an SMS message or e-mail to the learner or

their manager. (See Figure 7 on page 6 and Figure 8 on page 7.)

• **Notification Series** – This feature allows Sales Quenchers administrators to write, assign, and schedule e-mail blasts and SMS messaging campaigns to their subscribers. Key functions include embedded short-message and HTML editors, support for personalizing messages by inserting names or data elements, and localization and language support. It also supports integrated scheduling features, such as sending preset messages to every subscriber in a select group every Monday at 10AM local time. (See Figure 9 on page 7.)

 **Figure 3** Subscriber results for a specified Learning Nugget



 **Figure 4** Answers given by subscriber to a test or survey.

Measurable results and outcomes

Sales Quenchers concentrates on helping customers measure the effectiveness of their mobile training and communications initiatives. These results come in both easy-to-measure tangible results and harder-to-discern intangible benefits including:

- **Faster production and delivery times** – The digital versions of Sales Quenchers content are easier to create than the traditional Mem-Cards decks, and generally require a different type of resource to produce. Table 1 on page 8 compares these production efforts.
- **Lower production and delivery costs** – The digital version of a Sales Quenchers title costs 40% less to produce and deliver to each subscriber, on average, than a physical Mem-Cards title. (See Table 2 on page 8.) Pre-production costs (“content chunking”) for either model are basically the same, but production costs for the digital product are greatly reduced. In many cases, authors prefer to record their content in their own voice at their own expense. The reduction in printed production and physical shipping or delivery costs associated with the traditional Mem-Cards decks offsets the added expense for digital delivery of Sales Quenchers content. Finally, the mobile learner bears the majority of direct daily delivery costs, because most subscribers prefer to call in and retrieve their daily assignments to balance the demands of their schedule. Sales Quenchers does not incur connection charges for call-in CellCasts.
- **Intangible Benefits** – Organizations with Premium Plus subscription plans can easily produce and distribute their own content on any subject matter or sales initiative they care to add. This can improve communications with their distributed workforces in ways never possible before. Sales Managers with authorization can use their cell phones to call in to the CellCast server. They can then record a short “Market Update and Strategy” CellCast for their sales team, append a short test or feedback form to gather comments, assign the new CellCast to the team, and schedule the CellCast for immediate delivery. They can do all this without ever firing up their laptop. Every manager knows that closing the knowledge gap, and bridging the communication divide between parties, yields tremendous positive results for any organization. Everyone can participate, since few salespeople today are ever without their mobile phone.

Summary and conclusions

Since launching in August 2007, Sales Quenchers has already inked subscription contracts with hun-

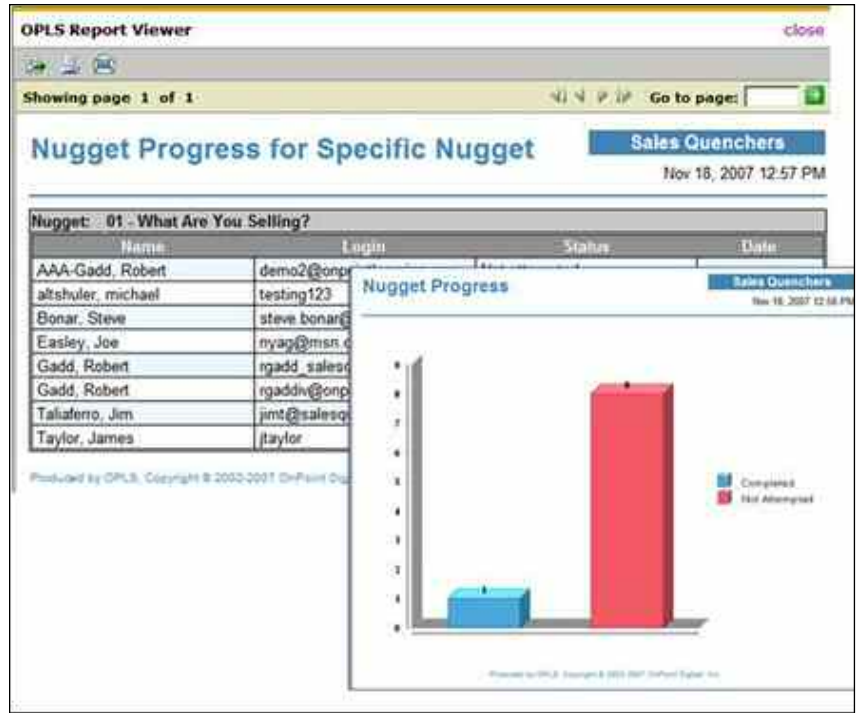


Figure 5 Standard Sales Quenchers Completion Report with Chart and Detail views

The screenshot shows a web form titled "Manage Your CellCasts" with tabs for "Assignments", "My Playlist", "My Status", and "My Devices". The form is for a "Cell Phone" and includes the following fields: Device Type (Camera Phone), Device Capabilities (Voice, SMS, MMS, Flash, Internet, Java, USB, RSS), Country Code (United States/Canada), Telephone # (912-555-3456), Wireless Carrier (AT&T/Cingular), Ownership (Organization), Accept SMS (No), and Delivery Method (Push/Pull). There are "Save" and "Cancel" buttons at the bottom.

Figure 6 Mobile Profile device details for selected User

The screenshot shows a web interface titled "CONTENT: NUGGET" with tabs for "Nugget Information", "Assignments", "Triggers", "Nugget Outline", and "Version". The main content area shows "Nugget 29 - Specific Types of Leads and Referrals" with a "Type" of "Cellcast" and a "Trigger Action" of "- select -". Below this are sections for "Assigned-To-Nugget", "Complete-Nugget", and "Notifications". The "Notifications" section includes a table with columns for Title, Language, Destination, Email, SMS, and Status. The "Assignments" section includes a table with columns for Object Type, Name, and Status.

Figure 7 Automated Triggers and Business Rules Editor: Workflow Definitions.

dreds of individual sales professionals. It has also signed bulk purchase contracts with several leading sales organizations in the multi-level marketing and trade associations. As of June 2008, there were several hundred unique mobile subscribers. The company has a pipeline of more than 50,000 subscribers expected to deploy in the 2009 calendar year. Adoption continues to accelerate because every customer (whether a sole proprietor or an international conglomerate) already has what they need to participate – a mobile phone with basic voice service and SMS services or e-mail.

For individuals, gaining wisdom, insights, and a pep talk from their industry's leading experts quickly, via their daily CellCasts, translates into more sales and accelerated learning. For organizations, CellCasting provides a quick, easy, and inexpensive way to reach every salesperson, with whatever content helps them overcome the obstacles and objections they face, using either the words of experts or words of their own – and knowing that the message was delivered, understood, and made immediately actionable.

Project summary

Description

Sales Quenchers dramatically transitioned their product and business delivery model from paper-based to digital, using CellCast services from On-Point Digital, Inc.

Links

<http://www.salesquenchers.com>
<http://www.mlearning.com>

Forms of training/learning used

On-demand and scheduled delivery of just-in-time content and assessments to knowledge workers, using Podcast-style audio "CellCasts," e-mail/messaging blasts, or downloadable m-Learning modules according to each user's preferred delivery modality. Available content includes a Master Library of more than 1,200 pre-packaged *Sales Nuggets/Tips* as well as support for organizations and managers to create and deploy their own just-in-time custom content using just their cell phone. Sales Quencher's end-to-end CellCast Solution provides support for new customer/learner subscriptions, which include fully integrated e-commerce functionality, content and interactive tests and surveys, and automated planning, scheduling, and distribution of mobile content and communications. Also included are tracking, reporting, and analysis of mobile results, and seamless integration with third party systems (such as LMS, CRM, ERP, or SFA platforms).



Figure 8 Automated Triggers & Business Rules Editor: Sample Results Message.

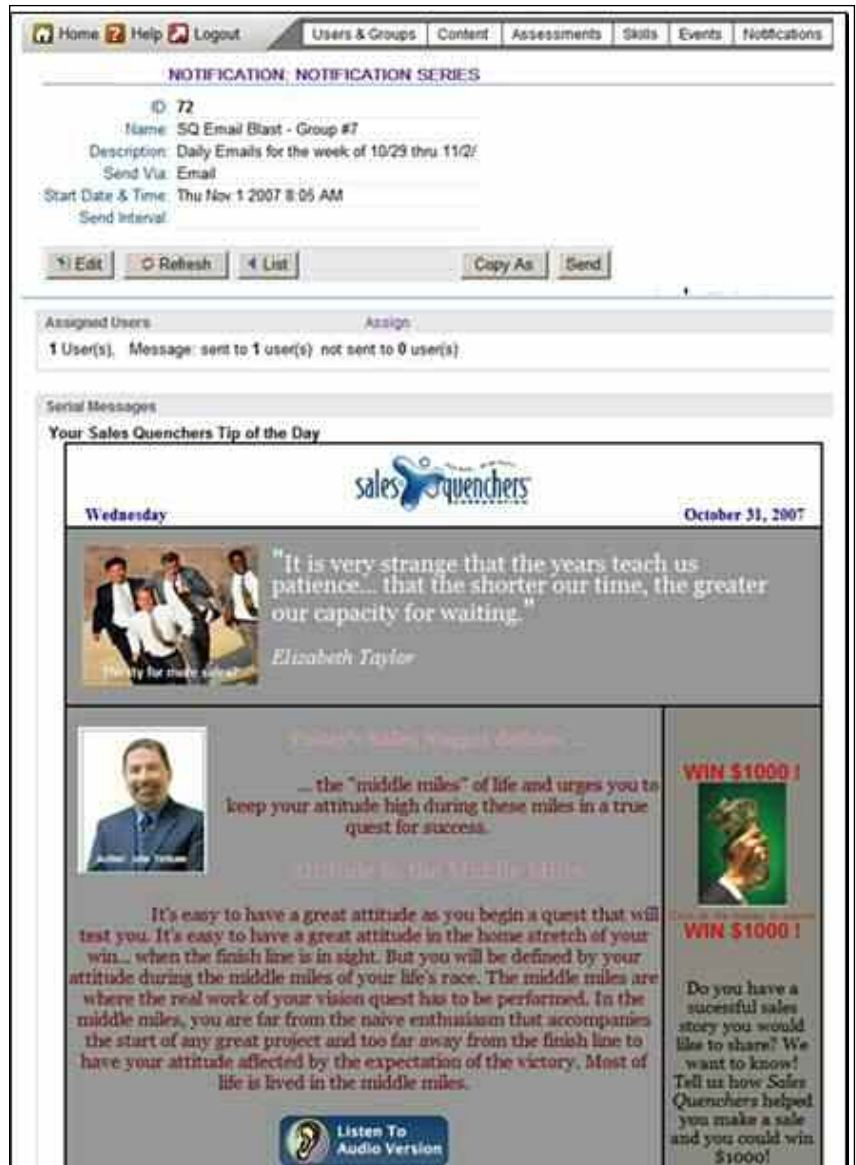


Figure 9 Notification Series - E-mail Message Editor

Number of learners that will use the system

Sales Quenchers' service is currently accessible to more than 500 sales professionals from a variety of multi-level marketing groups and trade associations, and the company forecasts this number to grow to 50,000 in 2009. The total addressable market exceeds 1 million potential participants.

Project cost

Sales Quenchers' subscribers pay an average of \$17/user/month for access to their world-class library of sales and personal development content, via five to seven scheduled CellCast broadcasts per week. Sales Quenchers' primary expenses are sales and marketing, content production services, content licensing and/or royalty payments, administration, and support personnel. The CellCast Solution platform is procured on a transactional basis via a Software-as-a-Service model that scales to meet Sales Quenchers' growth requirements, using a per user/per month cost model. Additional transactional fees incur on a customer-by-customer basis, based on system utilization, number of customer-created CellCast broadcasts, number of SMS messages sent/received, toll-free services used, etc. Sales Quenchers bills all incremental transaction fees directly to their customers.

Implementation time

Implementation time was nine months from inception to deployment, including design, content production, piloting, platform integration, site branding, and customization.

Tools, products, and services used

- OnPoint Digital's CellCast Solution v3.2, mLearning Pro platform; OnPoint Ecommerce platform ("OPEC"); and OnPoint CellCast Server appliances and hosting.
- Content production services using Melbourne, Florida-based Skylab Studios, a professional recording studio.
- Adobe Acrobat Professional v8.0.
- Audio Editing Tools: Audacity v1.25, Apple QuickTime Player Pro v7.4
- A standard cellular phone with voice plan and SMS services.

Author Contact

Robert Gadd is Cofounder and President of OnPoint Digital, Inc., a leading provider of online and mobile learning solutions for the corporate market. Robert oversees the company's technological innovations and strategy with OnPoint's CellCast

Table 1 Production Times for Typical Title (26 Nuggets)

Production Task	Resource	Mem-Cards	Digital
Content "Chunking"	Editor	1.0 day	1.0 day
Proof/Print (average)	Printer	5.0 wks	N/A
Record/Proof/Output	Studio	N/A	2.0 wks
Design/Layout e-mail	Admin	N/A	0.5 wks
Shipping/Distribution	Misc.	1.0 wks	0 (digital)
Total Production Times		6+ weeks	2+ weeks

Table 2 Production Costs (26 Nuggets/10K Units/Recorded by Author)

Production Expense	Resource	Mem-Cards	Digital
Content "Chunking"	Editor	\$450	\$450
Proofing	Editor	\$100	\$100
Card Layout/Setup	Printer	\$1,495	N/A
Studio/Mix (CellCast)	Sound Engineer	N/A	\$364
Produce/Delivery@\$2/ea.	Print/Ship	\$20,000	N/A
Digital Delivery	Telco/Internet	N/A	\$12,350*
Total Production/Delivery Costs		\$22,045	\$13,264

Note: 50% of CellCasts are call-in, and paid for by the subscriber with direct expenses of (\$0.025/message) times (26 messages per title) times (5K subscribers) = \$3,250. 50% of CellCasts are broadcast to subscribers with direct expenses of (2 min @ \$0.035/minute) times (26 Learning Nuggets/title) times (5K subscribers) = \$9,100.

Solution and mLearning Pro platforms, and is a recognized leader in the identification, cultivation, and commercialization of tools and processes that can help drive mobile content and communications delivery to knowledge workers everywhere.

Robert was formerly Cofounder and President of eDeploy.com, a Denver, Colorado-based, venture-capital-backed Web collaboration developer, which supported technology OEMs, carriers, and systems integrators like Cisco Systems, AT&T, NCR, and IBM Global Services. Prior to eDeploy.com, Robert was the Chief Technology Officer for Datatec Systems (Nasdaq: DATC), a leading systems integrator for Global 2000 high technology, communications, and retail customers.

You can reach Robert Gadd at rgadd@onpointlearning.com.

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Additional information on the topics covered in these articles is also listed in the Guild Resource Directory.

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- Ellen Wagner, "Mainstreaming Mobile Learning" (June 30, 2008)
- Tom Hall, "Exclusive: ToolBook for iPhone Sneak Peek" (March 10, 2008)
- Michael Kato and Vincent Ricci, "Mobile Learning in Japan: Why the Future has Already Arrived in Asia" (September 11, 2006)
- Guy Levert, "Designing for Mobile Learning: Clark and Mayer's Principles Applied" (June 19, 2006)
- Wendy Brunner and John Heinsteint, "E-Learning As You Like It: From Print to Desktop to PDA Using One Set of Content" (December 12, 2005)
- Paul Clothier, "An Introduction to m-Learning: An Interview with Ellen Wagner" (July 18, 2005)

Best of the Blogs

- "User-generated content": <http://www.elearn-space.org/blog/archives/003441.html> (July 16, 2008)
- "Lulu Using Scribd iPaper for Distributing Free Content" (Web-based alternative to PDF): <http://mashable.com/2008/07/14/lulu-scribd-ipaper/> (July 15, 2008)
- "More technology means more training at lower cost in the UK": <http://clive-shepherd.blogspot.com/2008/07/more-technology-means-more-training-at.html> (July 14, 2008)
- "Learning Objects in Virtual Worlds": <http://elearn-queen.blogspot.com/2008/07/learning-objects-in-virtual-worlds.html> (July 13, 2008)
- "Shifting Value Point of Content": <http://www.elearnspace.org/blog/archives/003434.html> (July 10, 2008)
- "Mind the Gap: Turning Vision Into Reality": <http://www.thesocialorganization.com/2008/07/mind-the-gap-turning-vision-into-reality.html> (July 7, 2008)



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