

# eLEARNING

THE **FUTURE** STARTS HERE

**NAVIGATING CX  
CHALLENGES IN THE  
DYNAMIC WORLD OF  
ELEARNING**

**PTW**



# ABSTRACT

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Global Market Insights predict that by 2023, the global eLearning market will reach a total market size of US \$282.62 billion – an increase of US \$127.1 billion from 2017. The aim of this paper is to identify why, and how, customer experience (CX) should be prioritized by eLearning providers seeking to increase customer loyalty and profitability. The first half of the paper addresses the key problems that eLearning providers face, while the second half offers solutions to those problems.

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## **PROBLEM**

## **STATEMENT**

**Evolving technology, rapid globalization, and ever-increasing customer expect are three of the key challenges facing eLearning providers today.**

**This whitepaper explores how eLearning providers (Learning Management Systems, Training Management Systems, Learning Experience Platforms, and content providers etc.) can convert these challenges into opportunities by prioritizing the customer experience (CX) to increase customer satisfaction and profitability.**

# INTRODUCTION

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**Today's consumer has more choice than ever before.**

Although manufacturing and business efficiencies between the 1950s and 1990s expanded the range of products and services available to the consumer, company advertisements were confined to a few television channels or printed publications, leaving consumers with limited knowledge when making a purchase decision.

The introduction of the internet revolutionized the modern business. It allowed consumers to review, rate and compare products on a global scale – shifting the power from the company with the largest advertising budget, to the customer. Though an abundance of consumer choice is generally regarded as positive, this hierarchical shift has created an array of obstacles for organizations.



## **THREE OF THE MAIN CHALLENGES**

## **FACING COMPANIES TODAY ARE:**

- 01 EVOLVING TECHNOLOGY**
- 02 RAPID GLOBALIZATION**
- 03 EVER-INCREASING  
CUSTOMER EXPECTATIONS**

**This paper will explore how all three challenges are interconnected within the realm of customer experience for eLearning providers, and the measures that can be embraced to overcome them.**

## What Exactly is “Customer Experience” (CX)?

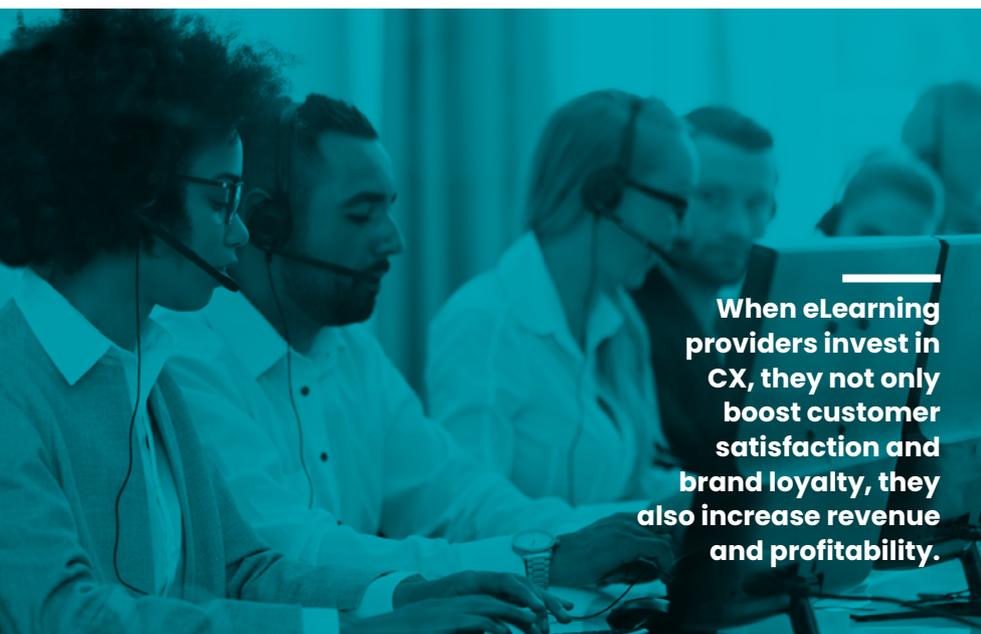
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Customer experience (CX) has become an increasingly common term in recent years. However, despite its frequent use, a common definition has never been fully established. For the purposes of this paper, Forrester’s definition of customer experience will be used:

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**“How customers perceive their interactions with your company.”**

The terms CX and UX (user experience) are often used interchangeably. Yet, there are subtle differences between them. First of all, user experience and customer experience have different measures for success. For example, UX metrics often focus on easily quantifiable metrics such as click-through-rate and page views; while CX metrics are usually qualitative, such as customer satisfaction and brand loyalty. With these definitions in mind, UX can be thought of as a *subset of CX*.




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**When eLearning providers invest in CX, they not only boost customer satisfaction and brand loyalty, they also increase revenue and profitability.**

is expected to arise from the increasing demand for flexible learning technology in both the corporate and academic sectors: organizations are recognizing the importance of employee development and training for productivity and employee satisfaction – which directly impacts their profitability; and academic institutions are recognizing the importance of delivering flexible learning materials to students in a cost-effective manner.

In a hyper-competitive environment, neither product nor price can be relied upon to differentiate one company from the next. Research by the Temkin Group found that companies with an annual turnover of US \$1 billion can expect to earn, on average, an additional US \$700 million within three years of investing in CX. When eLearning providers invest in CX, they not only boost customer satisfaction and brand loyalty, they also increase revenue and profitability.

## Predicted E-Learning Market Size: Why Does CX Matter?

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Global Market Insights predict that by 2023, the global eLearning market will reach a total market size of US \$282.62 billion – an increase of US \$127.1 billion from 2017. Various researchers, including MarketsandMarkets, anticipate that North America will account for the largest market portion. The expansion of the eLearning market size

## CX in Learning and Development Today

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People searching for learning and development (L&D) solutions in 2019 have different expectations compared to 30 years ago. Before the dawn of the internet, learners relied upon textbooks or face-to-face training delivered via an instructor. Today, it is commonly acknowledged that individuals learn differently, and it makes sense for both the individual and the institution to deliver learning material in the most effective format for the learner.



### Deloitte reports that 70 percent of employees will use web searches to learn what they need for their jobs.

Research from Google/Ipsos suggests that 91 percent of smartphone users will search for ideas on their mobile devices when completing a task, and 48 percent of smartphone users are more likely to buy from a company with instructional video content on its mobile site or apps.

Today's L&D customer **expects** the learning experience to be:

#### 01 Flexible

**The learner can study at his/her own pace through a variety of mediums**

#### 02 Enjoyable

**The learner takes pleasure interacting with the chosen content and platform**

#### 03 Effective

**The platform and material help the learner to achieve the desired learning outcomes**

This demand for flexibility, enjoyability, and effectiveness has paved the way for online learning (i.e. eLearning) within L&D, as well as emerging eLearning trends such as gamification, artificial intelligence, augmented reality and virtual reality.

## CX Trends within eLearning

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### Gamification

Gamification utilizes game mechanics such as points, progress bars, and leader boards in non-gaming activities. Its adoption has become particularly prominent within the eLearning industry since 2015.

Integration of gamification within the eLearning industry is only expected to increase. Fosway states that more than 90 percent of organizations expect utilization of gamification within their learning approach to increase or remain the same. However, other researchers, such as Mordor Intelligence, have noted potential drawbacks of gamification if it's not used correctly:



**“... it [gamification] incentivizes winning over other objectives. For training and corporate learning, employees who know how to ace a test, but don't necessarily know what they've been taught, are not wanted. Working in a corporate environment has traditionally been a relationship of exchanging time and effort for money, and this naturally leads to a lack of motivation in the long term, especially for millennials, who want to be engaged in meaningful work.”**

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### Artificial Intelligence (AI)

Artificial Intelligence (AI) enables computers to continuously learn and perform human-like tasks. The use of AI arises through areas such as course content generation chatbots or quiz programs that can ask the “best” question based upon the learner's experience. Adoption of AI is expected to increase within eLearning over the next few years:

Organizations who plan to implement AI:

**31%** plan to use it in the foreseeable future

**26%** plan to use it in the near future

**24%** plan to use it in the next few years

**19%** are currently using it in some form

– Synergy Learning

## CX Trends within eLearning

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# Virtual Reality (VR) and Augmented Reality (AR)

Virtual Reality (VR) is a computer-generated environment that a user can interact with, and Augmented Reality (AR) is a form of VR, whereby the real world is modified or enhanced through the use of virtual features. Zion Market Research predicts that the global VR market will increase from US \$2.2 billion in 2016 to US \$26.90 billion by the year 2022.

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# Social Learning

Social Learning stems from Albert Bandura's Social Learning Theory that people learn from each other through observation, imitation, and modeling. In order to utilize Social Learning within the eLearning environment, learners have to be placed in an environment with other learners – for example, a discussion forum within an LMS.

Social learning has been on the L&D radar since its theory was devised in 1977, however, it's only over the last couple of years that eLearning providers have started fostering social learning practices proactively.

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# Microlearning

Microlearning is one of the newer learning approaches that breaks down educational material into bite-sized learning units.

Microlearning was heavily under the spotlight in 2018, and its endorsement is only expected to increase through 2019 and beyond. In a 2018 study, Fosway found that around 70 percent of organizations expect the adoption of bite-sized learning and microlearning to increase within their learning delivery.

## What Makes an Outstanding Customer Experience?

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According to Forrester, through the lens of the customer, positive customer experience is based upon three things: usefulness (the value provided), usability (UX or the easiness to find and interact with the value) and enjoyability (the emotional engagement of interacting with the value).

Good customer experience will be achieved when a customer's positive expectation of a company are met or exceeded. Bad customer experience will be achieved when positive expectations of a company remain unfulfilled.

BrandWatch analyzed 10 million online conversations and customer opinions to compile a list of the **2018's top 100 brands for CX**, using the same three aspects of the customer journey as Forrester (service, value, and emotion). The top 10 brands they identified were:

- 
- 01 T-Mobile
  - 02 American Airlines
  - 03 Southwest Airlines
  - 04 MasterCard
  - 05 Reebok
  - 06 Lenovo
  - 07 Sony
  - 08 Comedy Central
  - 09 MTV
  - 10 Apple
- 

The most popular brand for CX to emerge from the research was T-Mobile, whose number one position can be largely attributed to their focus on customer support: "T-Mobile's customer care department has been named #1 in customer service satisfaction by Nielsen Mobile Insights."

Also, T-Mobile consistently responded to at least five percent of their @mentions every week and was able to reply quicker than all but one other company – taking an average of 3.5 minutes to reply after the initial customer message



**"32% of people who contact a brand on social media expect a response within 30 minutes. A further 10% expect a response within 60 minutes."**

– Convince&Convert

The second most popular brand identified from the research was American Airlines who use social listening to respond to their customers' needs. Taking a proactive approach to customer support, American Airlines are able to integrate customer feedback by sharing posts and message with every part of their business. Their maintenance team, for example, can be notified of missing safety cards on an airplane.

Although CX isn't an exact science – as emotion, value, and service can be difficult to measure – the following metrics can help companies to identify areas where the customer's experience can be improved:

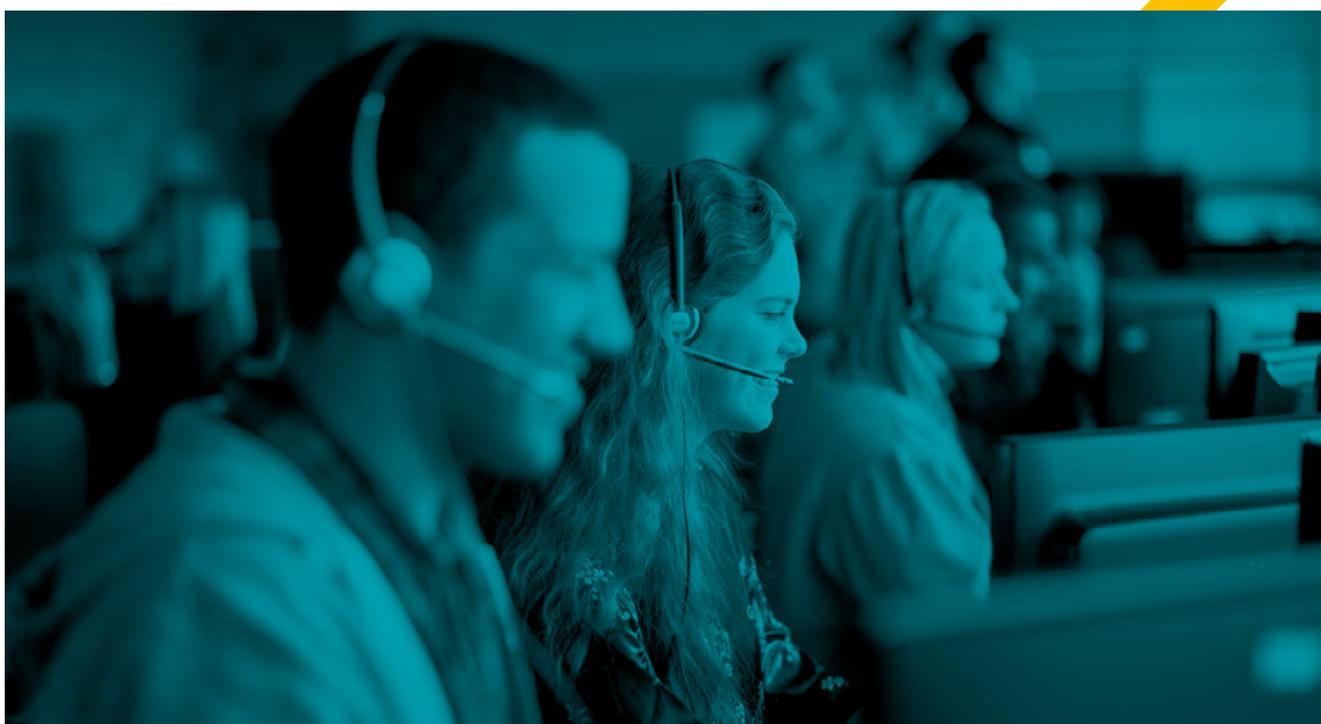
**Net Promoter Score (NPS):**  
how likely is a customer to refer a company to a friend and why?

**Customer Satisfaction (CSAT):**  
how would a customer rate the service or product?

**Customer Effort Score (CES):**  
how easy was it for a customer to solve his/her problem?

**Customer Churn Rate (CCR):**  
how many customers have stopped using the company's product or service?

Wherever possible, organizations seeking to provide outstanding CX are seeking to maximize NPS, CSAT, and CES, and minimize CCR.



## Common and Emerging CX Challenges for eLearning Providers

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**The three main CX challenges facing companies today – evolving technology, rapid globalization, and ever-increasing customer expectations – produce other difficulties for eLearning providers who are striving to succeed.**

### 01 Evolving Technology

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**Sub-challenge: Adoption of New Technology**

Staying in-tune with the latest tech often requires continued research and improvement. SaaS companies such as LMSs, TMSs, and LXPs, must continue to adapt their products to the latest devices and platforms while ensuring that the optimal level of service to the user is maintained.

**Sub-challenge: Innovation**

Constantly changing technical expectations for LMSs, TMSs, and LXPs means that many companies could find themselves taking a reactive – rather than a proactive – approach to the market conditions.

### 02 Ever-increasing Customer Expectations

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**Sub-challenge: Customer Retention**

As customers now have more choice than ever, eLearning providers must continue to fight for their customers' loyalty. High customer retention indicates customer loyalty, which contributes to a positive brand image.

**Sub-challenge: Customer Engagement**

Customer engagement is a future indicator of customer retention: a sudden decline in engagement can be a warning sign that a customer may be dissatisfied with the service that the company provides.

**Sub-challenge: Customer Support**

As customer bases grow, companies struggle to support the customer in the way that he or she would like to be helped.

### 03 Rapid Globalization

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**Sub-challenge: Multiple Languages**

Despite the rise of languages like Chinese, Spanish, and Arabic, English is still the dominant world language. Nevertheless, if eLearning providers want to remain relevant, or break into new markets, they must adapt to the ways in which the world communicates.

**Sub-challenge: Cultural Considerations**

Breaking into international markets requires cultural understanding in order to attract customers with different needs and expectations.

**Sub-challenge: Ability to Differentiate**

With the eLearning market expanding steadily, eLearning providers find themselves competing in the global market with other companies providing similar services for lower prices.

## Solutions

The emerging challenges within the eLearning industry, combined with the complexities of CX can be addressed by eLearning providers by incorporating the following solutions.

# Create a Customer Journey Map

Challenges addressed: All

Gartner defines customer experience management (CEM) as

**“the practice of designing and reacting to customer interactions to meet or exceed customer expectations and, thus, increase customer satisfaction, loyalty, and advocacy.”**

One of the best ways to start designing a successful customer experience is to identify your customer touchpoints.

A customer touchpoint can be defined as an interaction between a customer, or potential customer, before, during or after they interact with your product or service.



The customer journey stages are:



For eLearning providers, the main touchpoints within the customer journey stages are:

+ Word of mouth

+ Testimonials, reviews, and ratings

+ Marketing and PR

+ Community involvement

+ Website

+ Learning platform and content

+ Emails

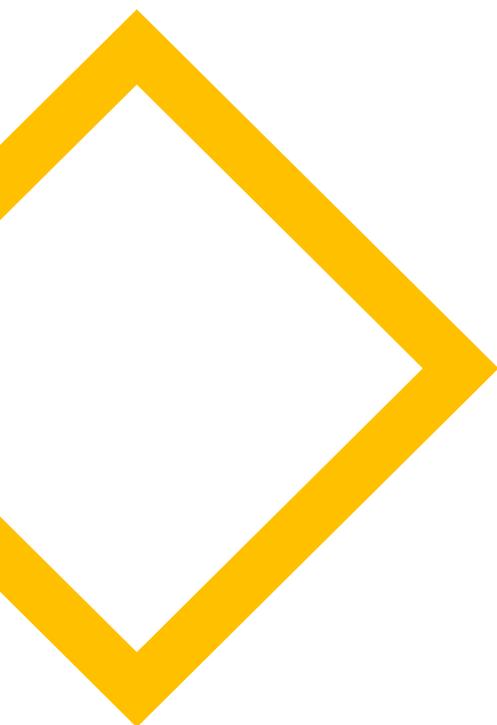
+ Customer support team

+ Sales team

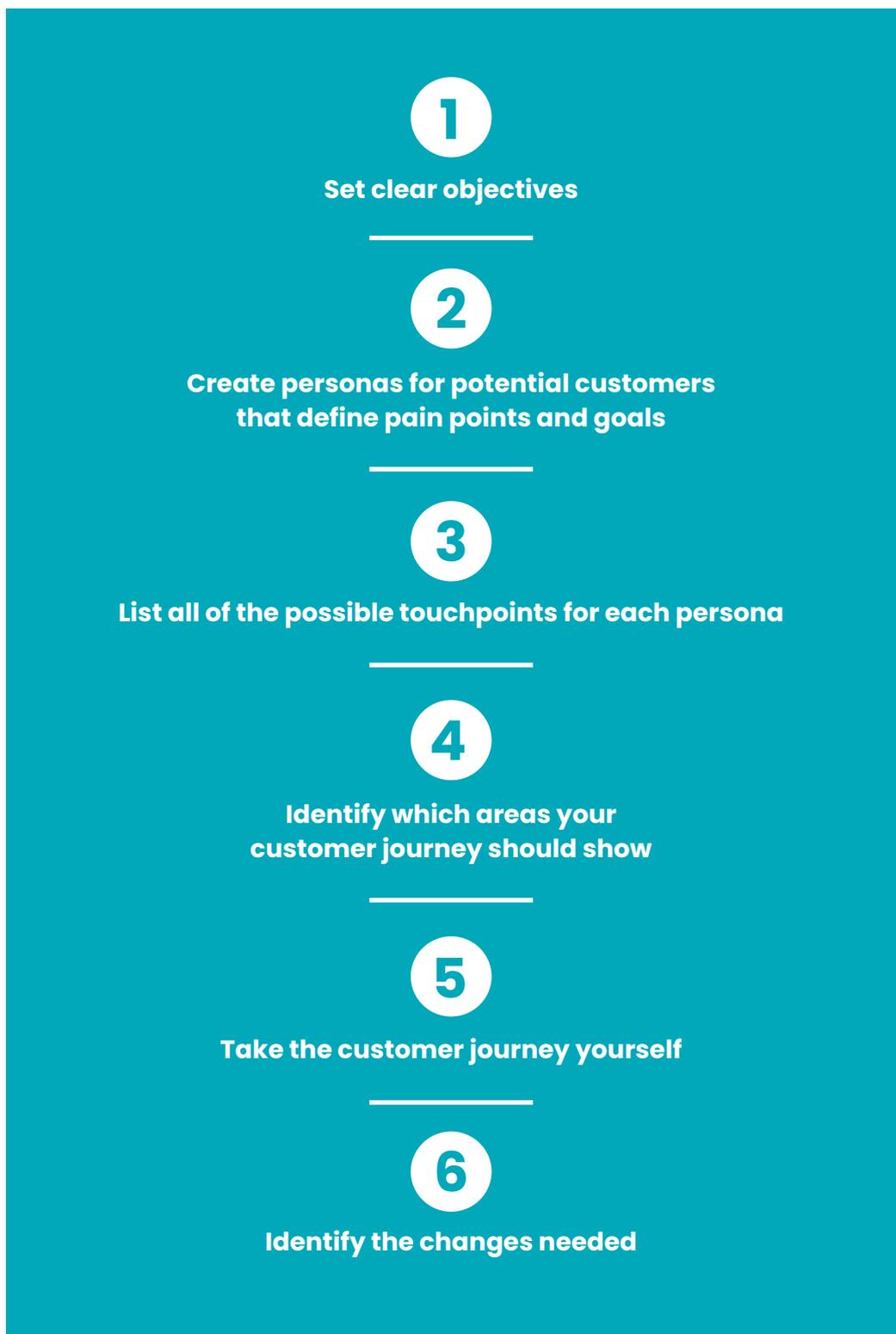
+ Office

**A customer's perception of your brand starts at the Awareness stage – before they've even engaged with your service or product. To provide potential customers a positive experience at all stages of the customer journey it helps to create a customer journey map.**

The customer journey map allows you to compare the ideal customer experience to the customers' current experience, and identify ways for you to bridge the gap. Here are the steps:



For eLearning companies who want to provide outstanding customer experience, they must view their products, services, and customer-facing interactions through the eyes of the user, and consistently live up to their brand promise.



# Speak Your Customers' Language

**Challenges addressed: Customer Support, Multiple Languages, Customer Retention and Cultural Considerations**

An exceptional customer experience relies upon your company's ability to communicate with your audience exceptionally. Unless a customer is extremely proactive in practicing foreign languages, he or she will likely prefer to communicate in his or her chosen language.

**According to Kissmetrics, acquiring a new customer costs seven times more than retaining one.**

A recent study by Common Sense Advisory of more than 3,000 consumers in 10 countries found that 55 percent of consumers prefer buying from websites available in local languages, and 53 percent of them are more at ease when buying in native languages. Research from ICMI suggests that 57 percent of customers expect customer support in their native language. Therefore, failing to meet these expectations will result in an underwhelming experience for the customer.



## “Consumers feel the most significant root causes of poor service are:

- + Repeating themselves
- + Being trapped in automated self-service
- + Forced to wait too long for service
- + Representatives don't know my history and value
- + Cannot switch between communication channels easily”

Offering support in your customer's native language will not only increase satisfaction for your current buyers, it will also encourage other speakers of that language to make a purchase.

Providing exceptional customer service is about more than multilingual support though. It also involves responding to customers quickly, and proactively integrating a customer feedback loop that helps your company improve.

# Provide Quality

**Challenges addressed: Customer Retention, Customer Support, Customer Engagement, and Ability to Differentiate**

Customers expect companies to provide them with the quality products and services they need, as and when they are needed. For eLearning providers, eLearning Industry specifies that the four elements that contribute to effective learning outcomes are:

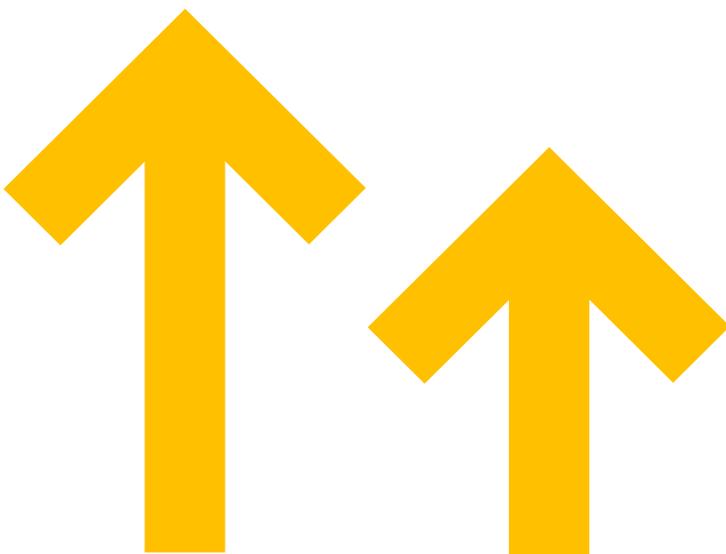
- + **The curriculum – the overarching content plan**
- + **The learning design – the learning platform (LMS, TMS etc.)**
- + **The course content (audio, video, text etc.)**
- + **The delivery process**

To deliver the high-caliber product your customers deserve, quality should be prioritized within each of the four learning elements. However, in terms of the curriculum and course content, the quantity of content should also be considered (e.g. microlearning).

Quality assurance (QA) should also form a large portion of your development process. Equipped with a customer-centered QA team and a customer journey

map, you will be able to identify possible design or course content improvements, as well as bugs and errors.

Brand quality should be maintained when company representatives interact with customers (or potential customers). By focusing on continued training and development, employees within your organization will be better equipped to resolve customer enquiries to the highest quality.



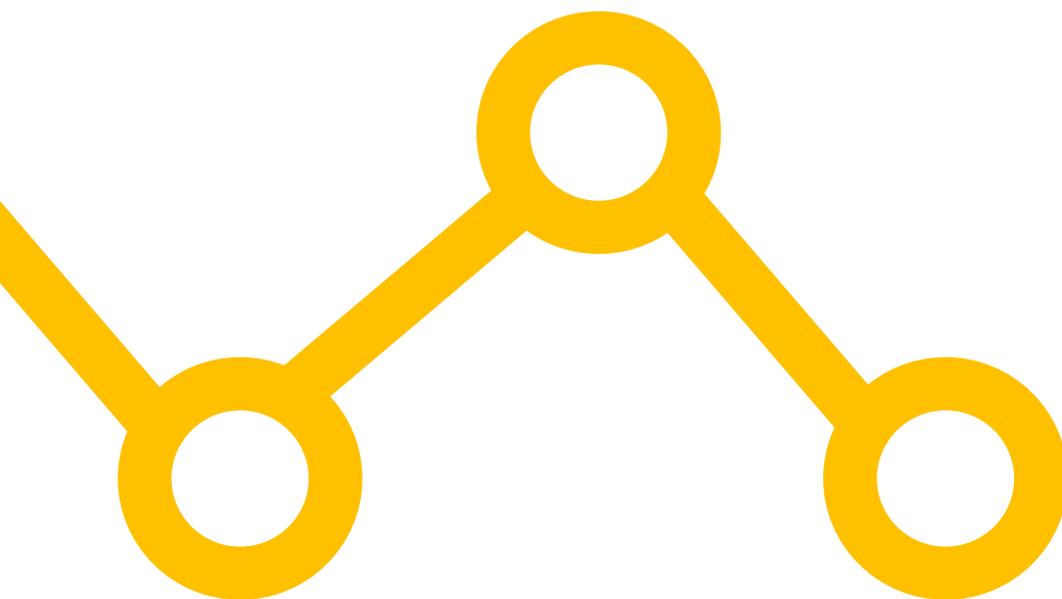
## Harness the Power of Data

**Challenges Addressed: Customer Retention, Customer Support, Customer Engagement, and Ability to Differentiate**

An added benefit of providing learning content via an online platform such as a TMS is the ability to efficiently collect data to drive continuous improvement. Integrating an effective customer feedback loop to proactively capture key CX metrics such as the NPS and CES, will enable your company to make data-driven decisions that greatly enhance the customer journey. Other KPIs worth measuring are:

- + **Course or module completion rate**
- + **Learner performance**
- + **Learner progress**
- + **Learner proficiency**
- + **Assessment results**

Harnessing the power of your data will also help you to monitor performance of existing learning modules, and determine whether content should be refreshed, removed or replaced.



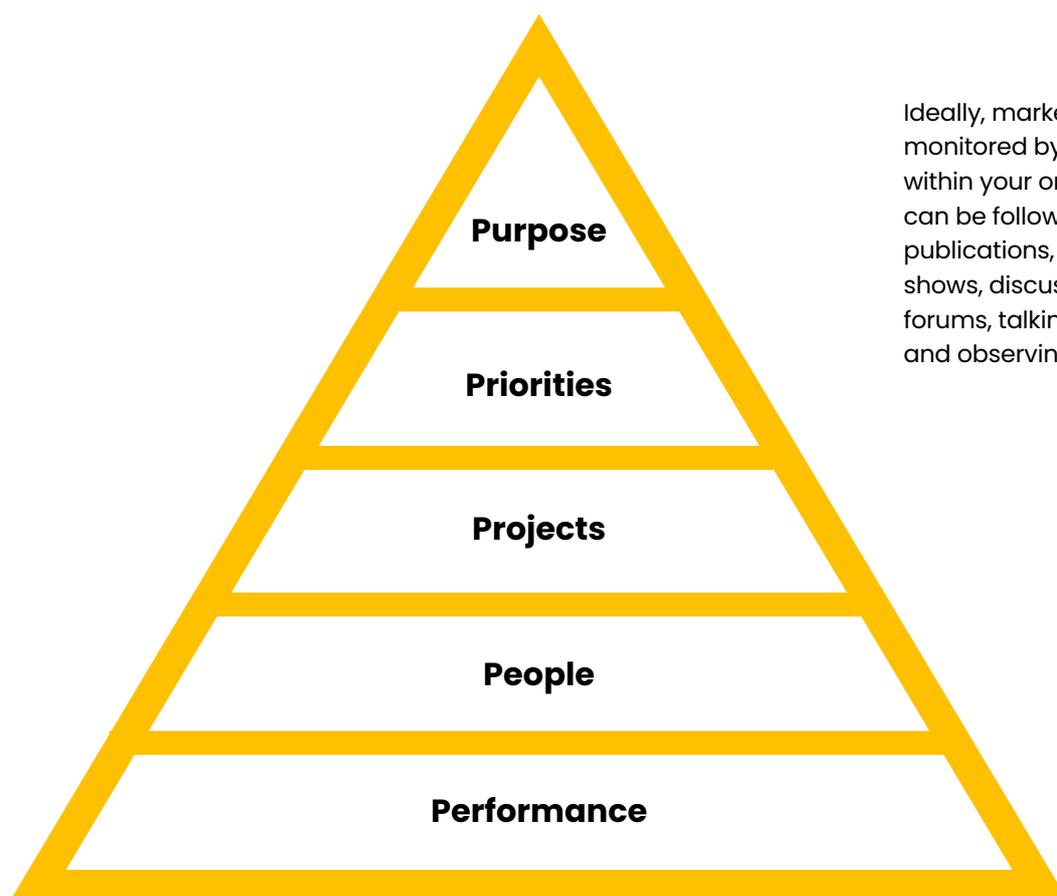
## Invest in Research and Design

**Challenges Addressed:  
Customer Retention,  
Adoption of New  
Technology, Ability  
to Differentiate, and  
Innovation**

Although the adoption of technology trends such as gamification, AI, and VR etc. are only expected to increase as the market size of the eLearning industry expands, the future of L&D can never be certain. To stay relevant, and competitive, Research and Design (R&D) should be prioritized within a company's daily activities.

For companies who struggle to find time for innovation – specifically smaller organizations with limited resources – The Hierarchy of Purpose can be used to establish priorities and set a framework that supports strategic improvements.

**In the Deloitte Innovation Survey of 2015, 66 percent of respondents stated innovation is important for growth.**



Ideally, market trends should be monitored by a dedicated team within your organization. Trends can be followed through online publications, newspapers, trade shows, discussion boards and forums, talking to your customers and observing your competitors.

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## **Got questions?**

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