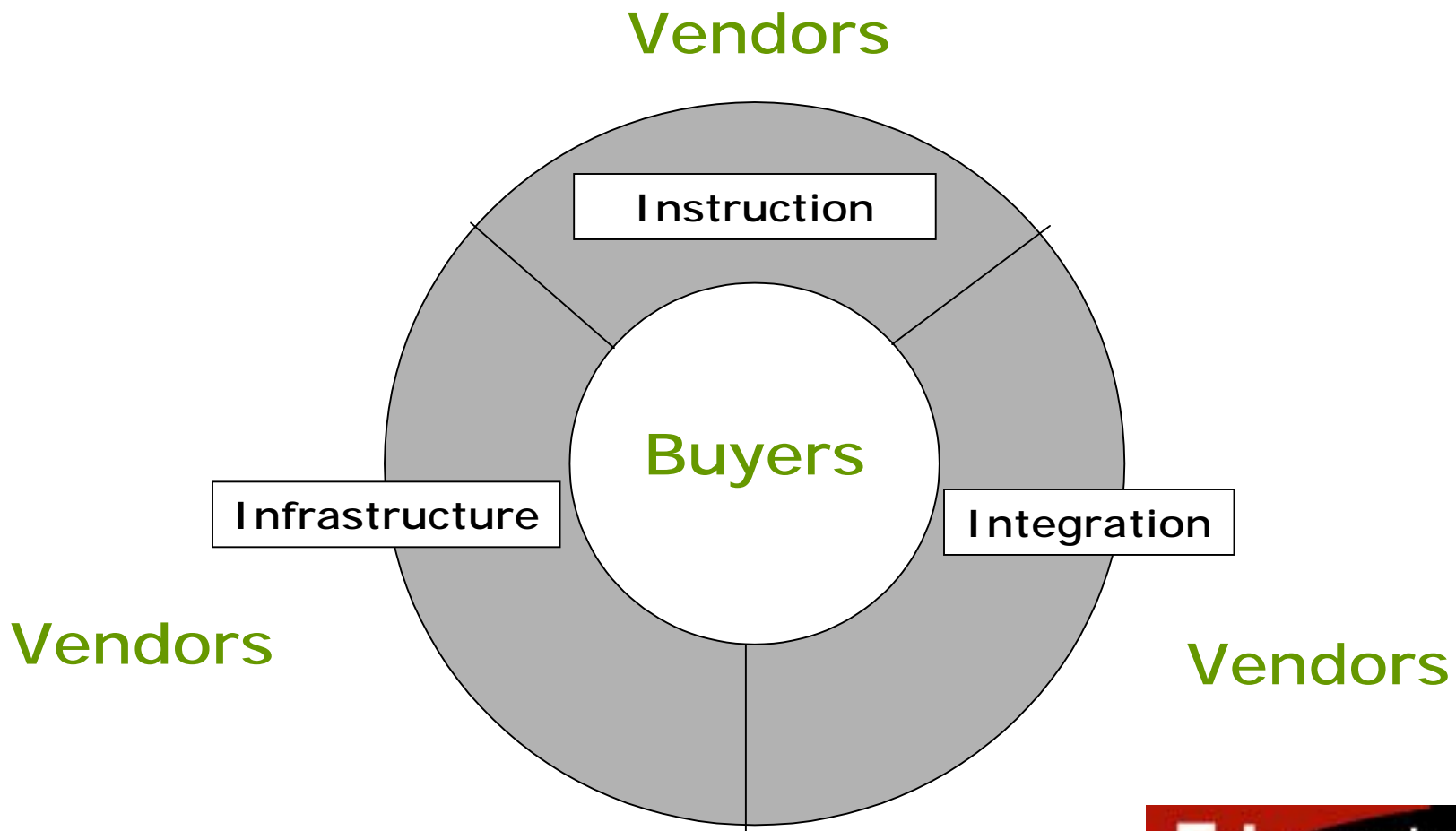

Learning Markets Review & Outlook 2002/2003

Intech Conference & Expo 2002
Navy Pier, Chicago
October 29-30, 2002

Agenda

- **About Intech**
- Industry & Sector Overview
- Key Strategy Issues

About Intech



The I n's in Intech

- Infrastructure: the basic facilities, services, and installations needed for the functioning of an institution
 - Hardware, software, tools
- Instruction: the action, practice, or profession of teaching
 - Content, supplemental materials
- Integration: the act of forming, coordinating, or blending into a functioning or unified whole
 - Cost/time efficiency, network effects

Attendees

- K-12
 - CTOs, Superintendents, Principals, District Administrators
- Postsecondary
 - Presidents, Deans, Provosts, CIOs, Directors of Distance Learning & Instructional Programs
- Corporate
 - CEOs, Presidents, EVPs, GMs, CLOs, Training Instructors

Conference & Expo

- Vision sessions
 - What's over the horizon?
- Case study sessions
 - Where do you go for best practices?
- Strategy sessions
 - How do you prepare and launch a successful learning program?
- Exhibits

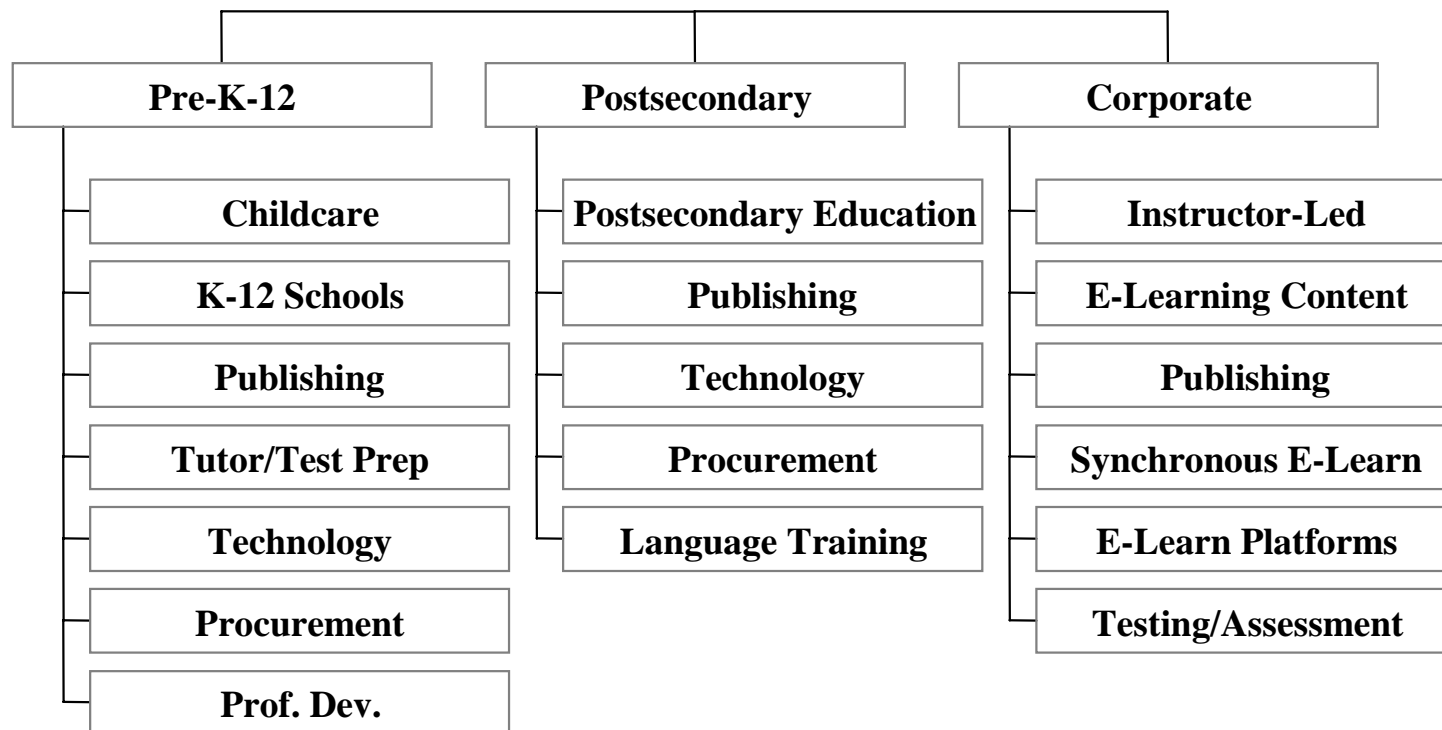
Dialogue

- Listen
 - Where is the technology going?
 - What are the best practices?
- Touch
 - Exhibits
 - Sponsor Led Discussions/Vendor Views
- Challenge
 - Raise questions
 - Make sure you're being heard

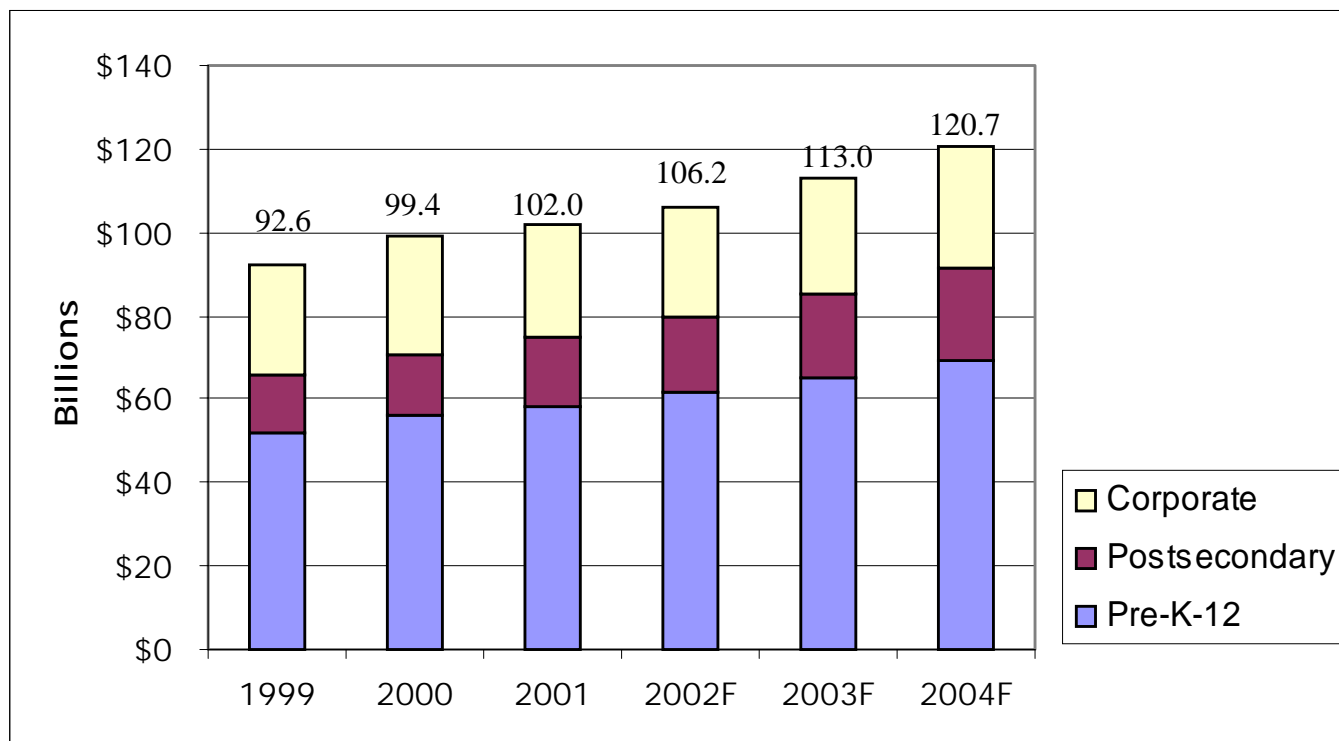
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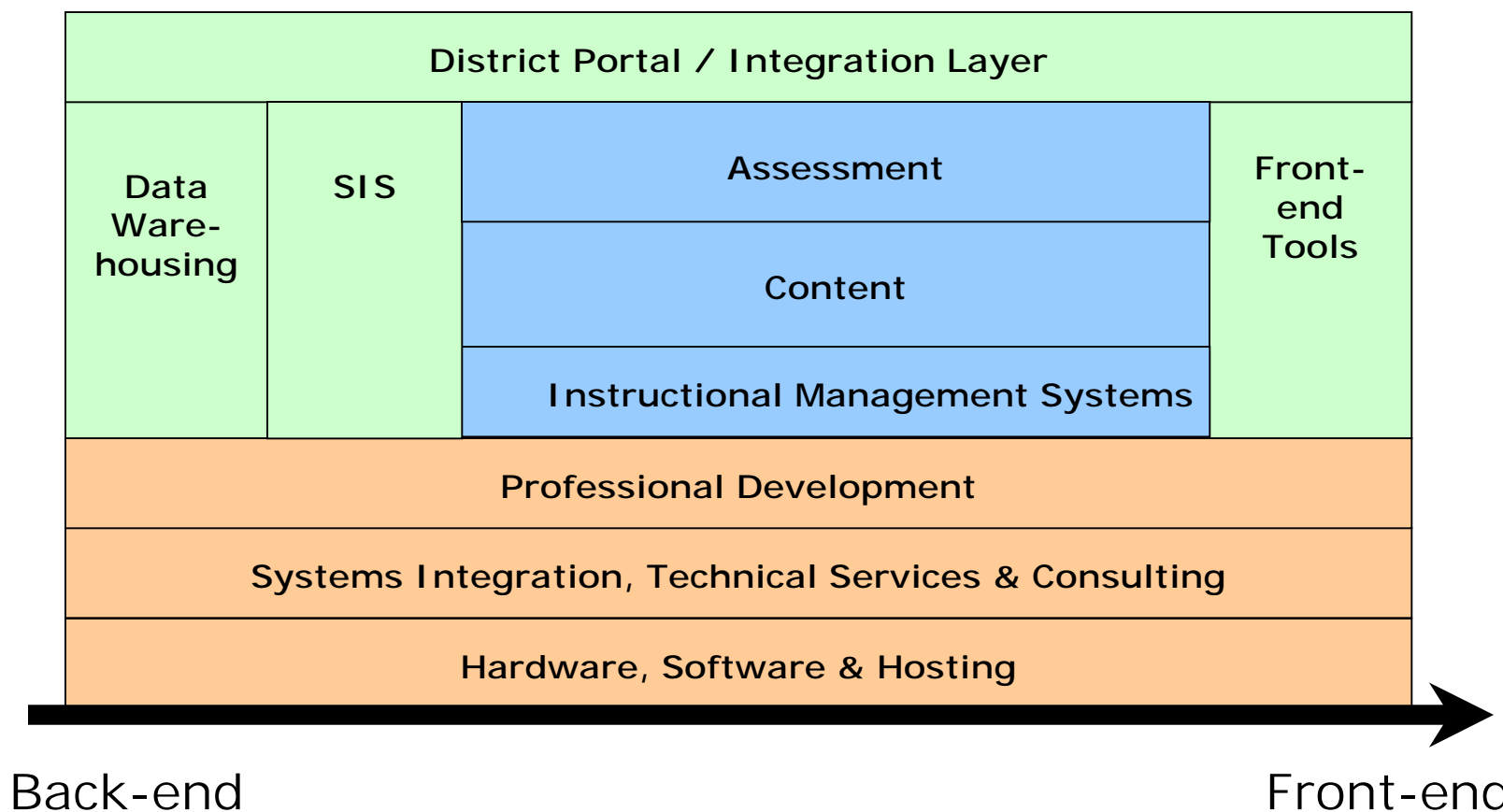
Learning Markets



Education Industry Revenues



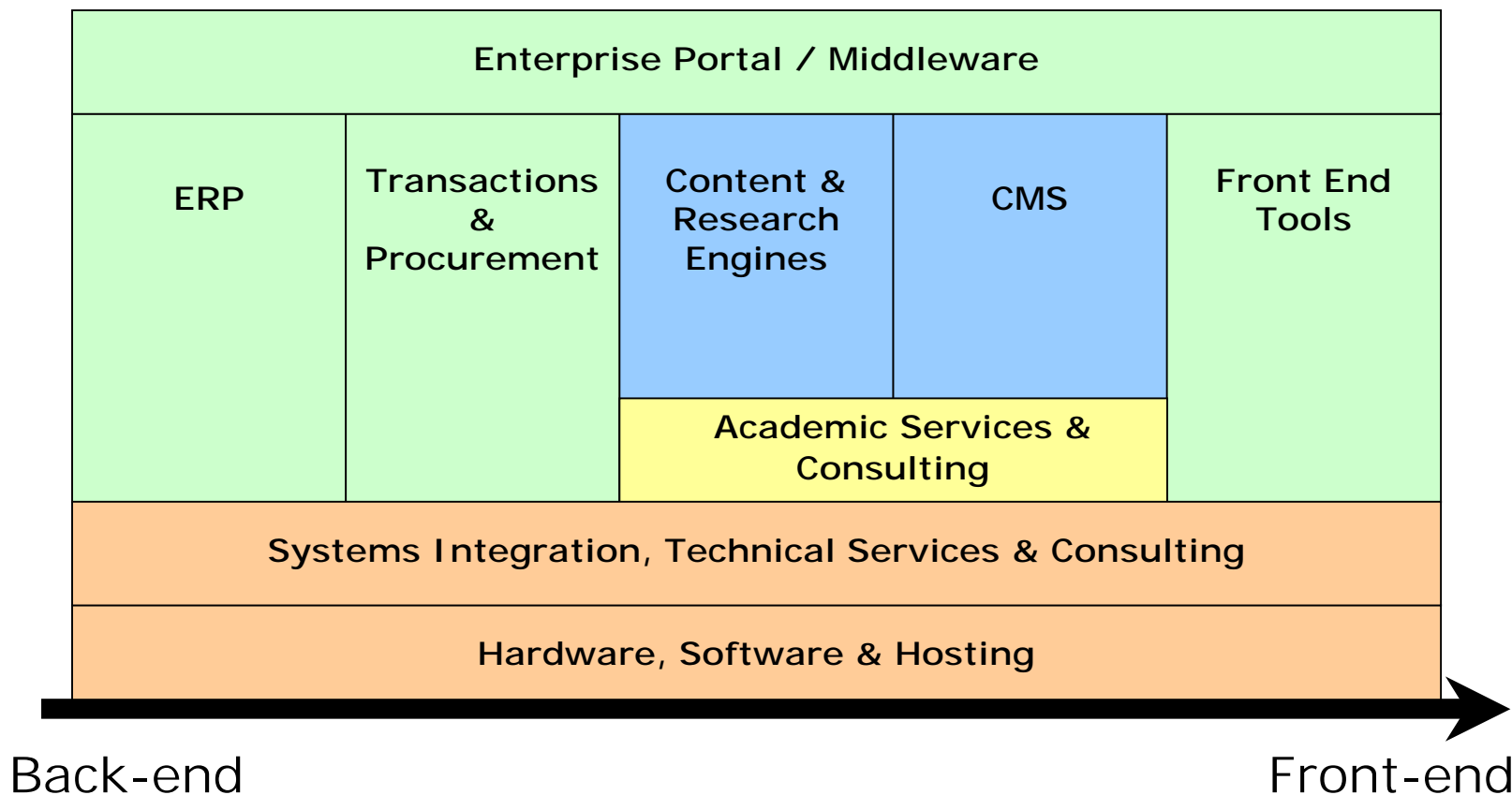
K-12 E-Education Framework



Pre-K-12 Technology Indicators

	Where We've Been	Where We're Going	
Infrastructure	42% of classrooms with Internet access	100% of classrooms with Internet access	
	11 students per instructional computer	1-to-1 computing solutions	
	Schools establishing computer labs	States purchasing laptops for students	
Instruction	Supporting instruction with technology	Using technology to deliver instruction	
	Paper-based assessment resources	Real-time handheld assessment capabilities	
	Showing filmstrips and videocassettes	Accessing web-based digital curriculum	
Integration	IT coordinators procuring technology tools	CIOs outlining district technology architecture	
	Independent admin. and academic systems	Comprehensive, interoperable solutions	

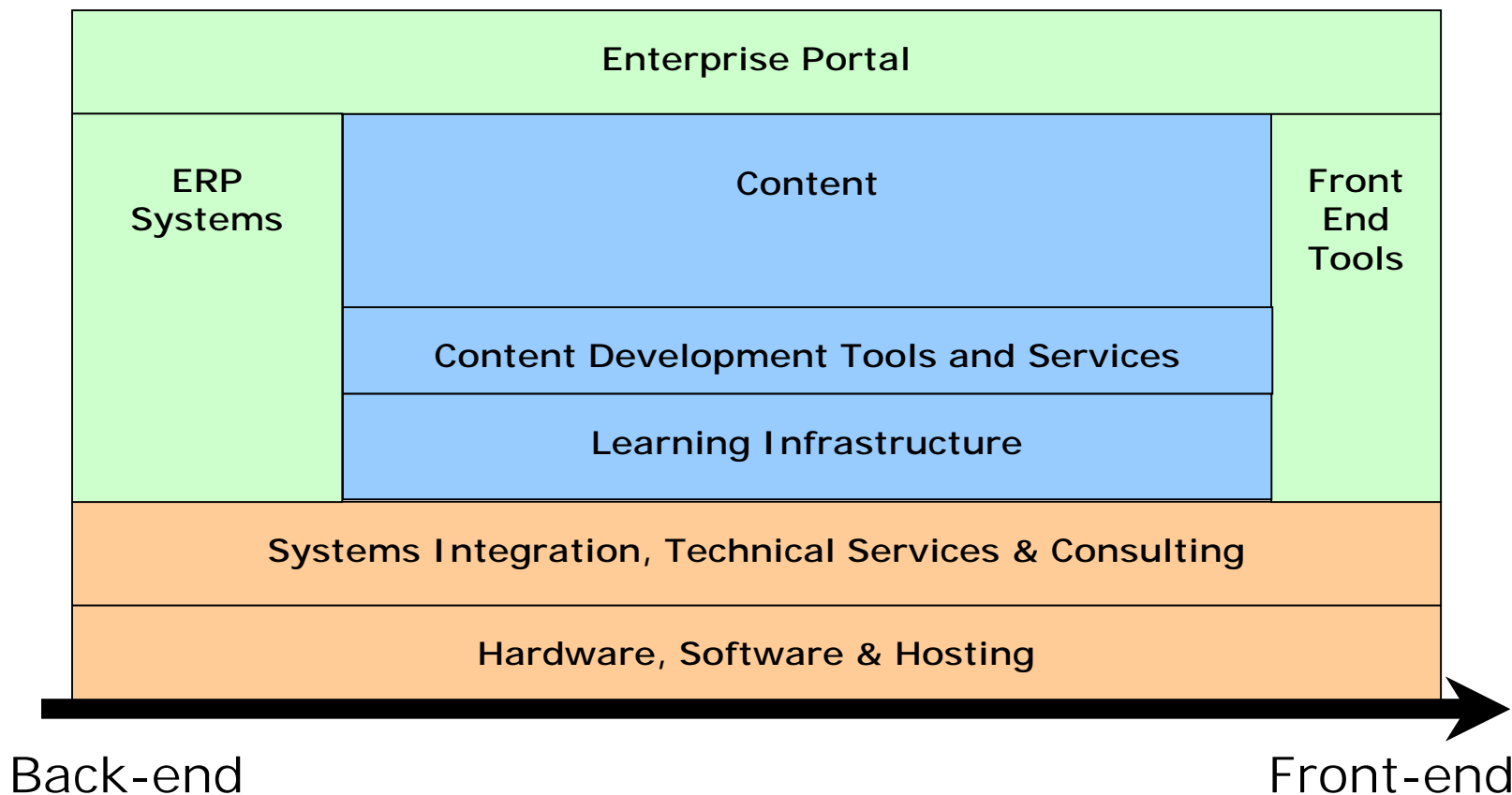
Postsecondary E-Education Framework



Postsecondary Technology Indicators

Where We've Been		Where We're Going	
Infrastructure	The wired campus	The wireless campus	Instruction
	Snail mail correspondence courses	Web-based distance learning platform	
	9-5 student support services	24x7 self-service applications	
Integration	Textbooks and coursepacks	Digital learning objects	Instruction
	The University of Phoenix	The University of Phoenix Online	
	Professors' e-learning experiments	Institutions' e-learning strategies	
Integration	Siloed admin. and academic systems	Enterprise-wide e-education solutions	
	Systems integration	Web services	

Corporate E-Education Framework



Corporate Technology Indicators

	Where We've Been	Where We're Going	
Infrastructure	<ul style="list-style-type: none"> Selecting a learning management system Behind-the-firewall, client-server solutions Delivering to internal audiences 	<ul style="list-style-type: none"> Building a knowledge infrastructure Hosted applications and web services Serving the extended enterprise 	
	<ul style="list-style-type: none"> Broad-based content libraries ILT vs. e-learning Delivering training and education 	<ul style="list-style-type: none"> Personalized learning tracks Blended learning solutions Improving business performance 	Instruction
	<ul style="list-style-type: none"> Connecting point products Identifying functional training opportunities 	<ul style="list-style-type: none"> Procuring bundled solutions Executing on human capital management strategies 	
Integration			

Why Do These Frameworks Matter?

- Capture the convergence and integration of organizations' key business and operating (i.e., teaching and learning) systems
- Acknowledge new set of potential providers in selected markets as concept of solutions expand
- Require buyers to view procurement decisions as a series of connected discussions, not an amalgamation of disconnected vendor products
- Help vendors and customers move conversation from integration to interoperability

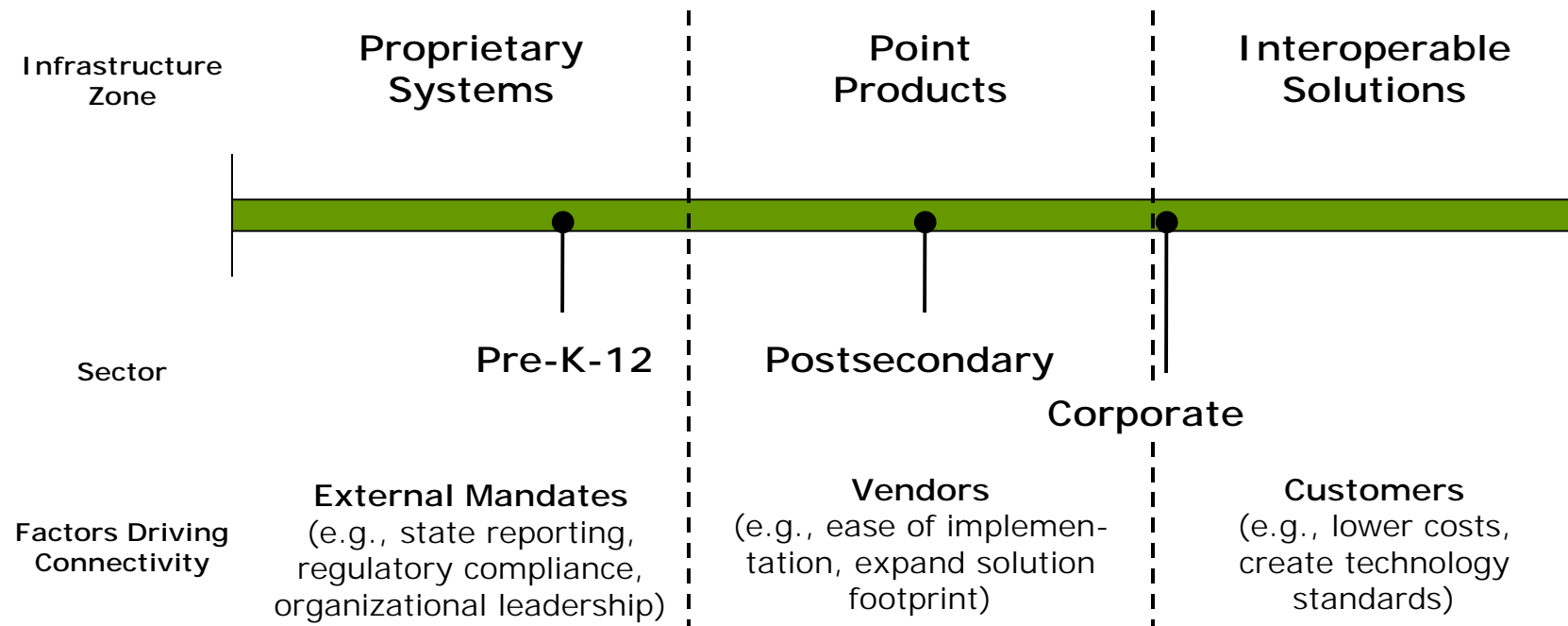
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Infrastructure: Creating Connectivity

- Systems can no longer afford to work in isolation from one another
 - K-12 districts must coordinate student assessment data, educator professional development tracking, and district performance
 - Postsecondary institutions drive to establish enterprise portal capabilities
 - Corporations struggle to incorporate LMS as component of a broader knowledge and ERP infrastructure
- Transitioning organizations from siloed systems to interoperable solutions is the new vendor mandate

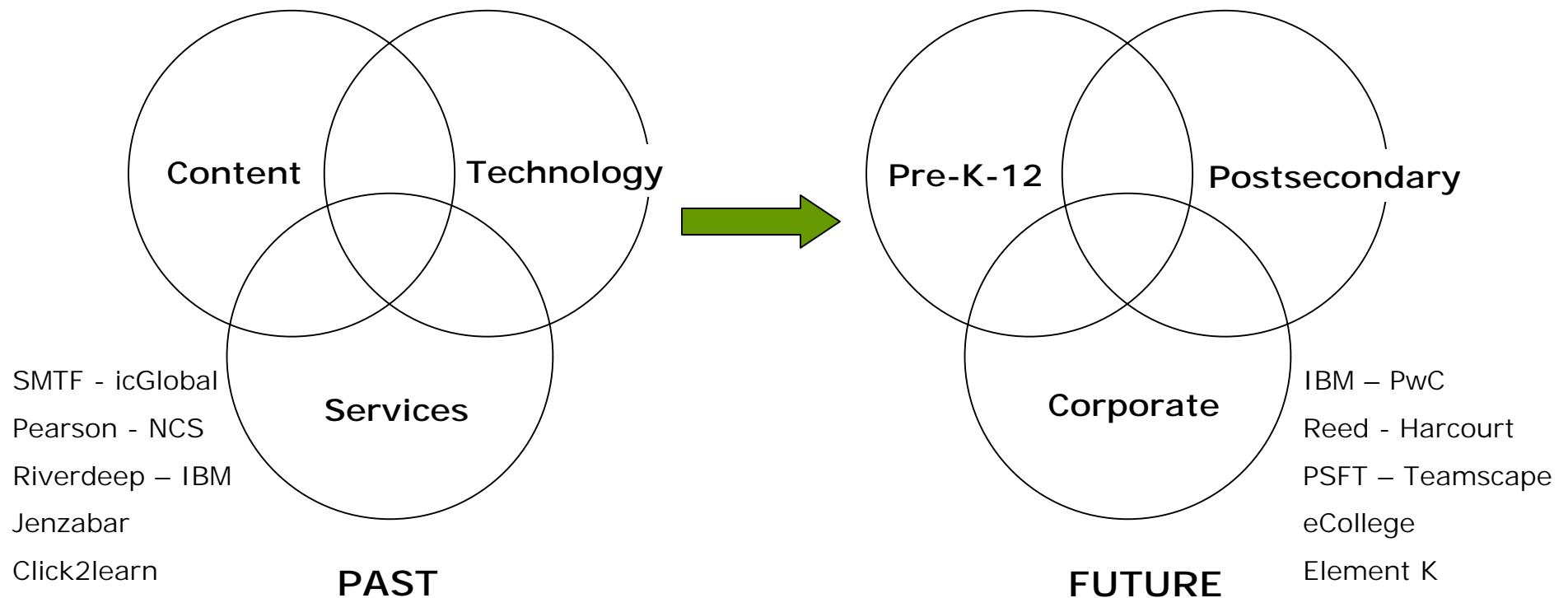
Infrastructure: Creating Connectivity



Instruction: Moving to New Sectors

- Companies increasingly looking across traditional market sectors to deliver instructional solutions and resources
 - Postsecondary CMS players targeting K-12 virtual schools market
 - Corporate e-learning providers exploring higher education online learning opportunities
- Gaining sector expertise – and applying that to instructional solutions – will be critical for vendor success

Instruction: Moving to New Sectors

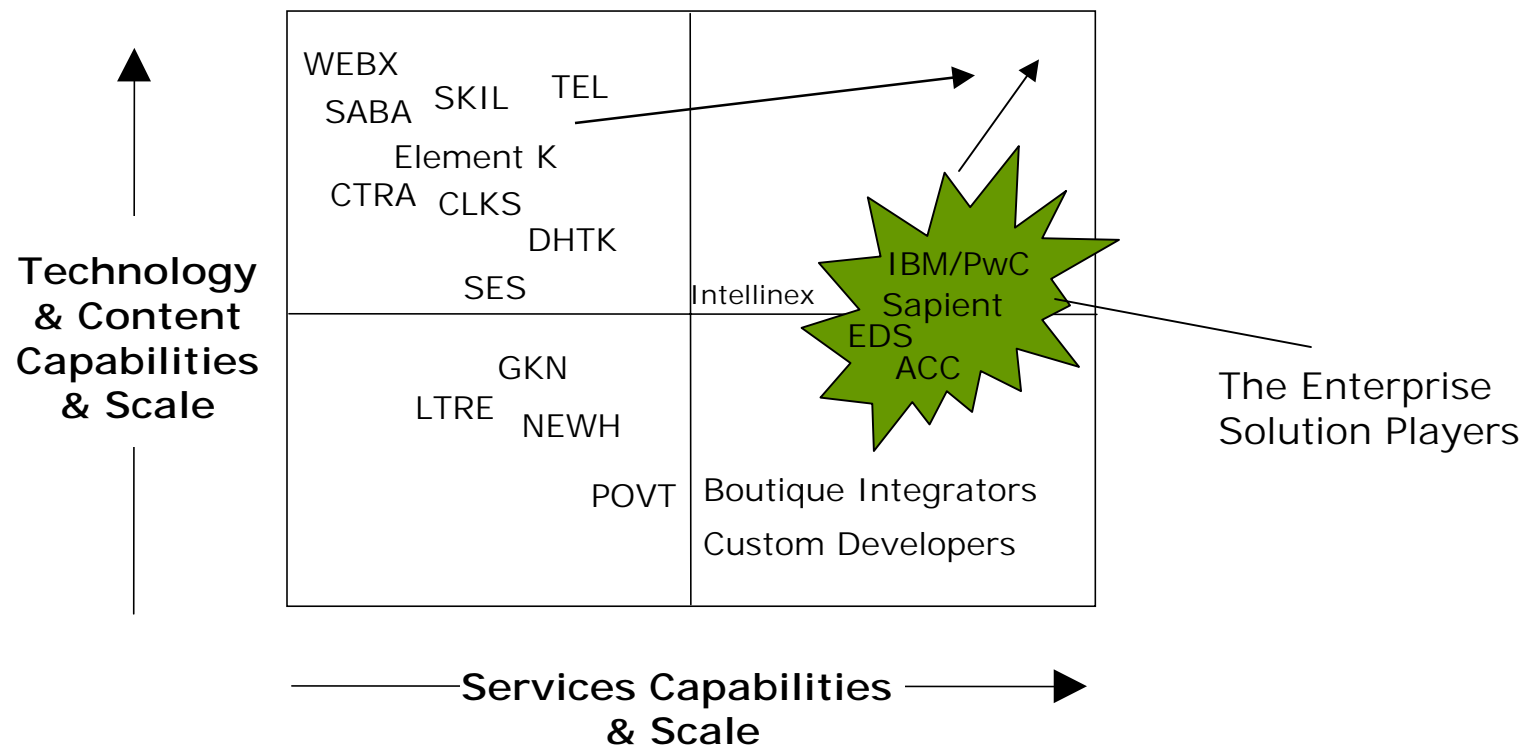


Integration: The Service Imperative

- Integration complexity across disparate systems demands keen attention and oversight
 - Service maximizes the value of best-of-breed content and technology
 - With a limited number of accepted standards, service is the key to improving customer performance and satisfaction
 - K-12 sector can learn from postsecondary and corporate experiences
- Market leaders will help customers shift from managing systems integration to capitalizing on solution interoperability

Integration: The Service Imperative

The Corporate Learning Landscape



Back to Basics

- Why believe it this time?
- What does it help you do?
- Why does it cost so much?
- Is it clear where the technology is going?
- Do you really need vendors right now?
- How do you measure it?

Thank You

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