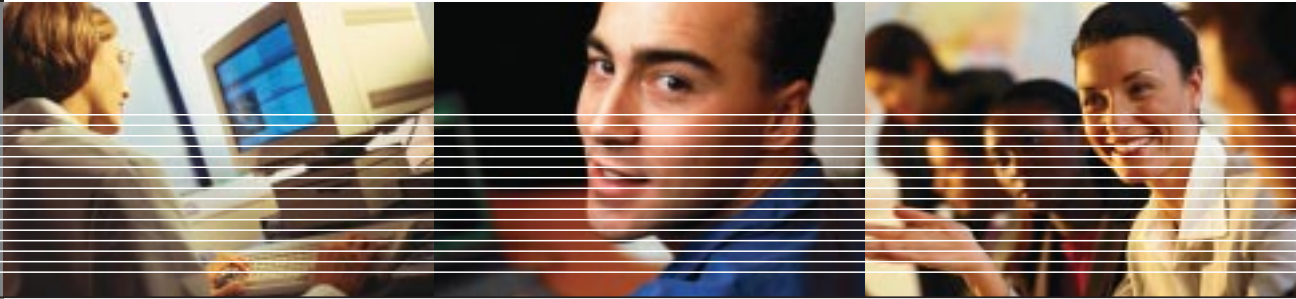


GET READY FOR LEARNING OUTSOURCING  
HR OUTSOURCING'S NEXT WAVE



EMPLOYEE CARE LEARNING SERVICES

CONVERGYS

# GET READY FOR LEARNING OUTSOURCING

## HR OUTSOURCING'S NEXT WAVE

*Learning outsourcing combines the benefits of shared services and advanced technology to create breakthrough impact on the cost, quality, and availability of learning across the global enterprise.*

### INTRODUCTION TO LEARNING OUTSOURCING

Business Process Outsourcing (BPO) refers to the outsourcing of an entire business process, usually to reduce costs and/or to improve the performance of that business process. BPO has been common with information technology services for several decades, and outsourcing of discrete human resources (HR) services like health and welfare, retirement, and payroll processing has also been widespread for many years. *We believe an increasing number of companies will explore the BPO approach for learning and education (L&E), given L&E's rising cost and complexity.*

In April 2000, Nortel Networks announced a five-year commitment to outsource management, professional, desktop, and technical training programs—as well as all supporting learning technologies, administrative services, operations, logistics, and vendor management. This landmark engagement triggered organizations such as American Express, Avaya, CIBC, Prudential Financial, the State of Florida, and Unisys to follow similar strategies. While the relative scale of each organization's commitment to outsourcing has varied, at a minimum all have outsourced multiple, linked training processes or functions.

Learning outsourcing is being driven by four major trends:

1. **Emergence of scalable, enterprise technologies for learning.** These technologies enable more effective creation, delivery, and management of learning across the organization.
2. **Application of shared service principles to the L&E function.** An increasing number of companies, following the lead of HR, are creating shared service functions for learning that provide infrastructure and administrative services across the enterprise.
3. **Proliferating supply chain for learning services.** Training is an immense procurement activity, and with the influx of technology and services providers, the supply chain for learning continues to multiply and presents the buyer with increasing complexities.
4. **Escalating size of corporations' investment in learning.** It is not uncommon for a Fortune 1000 company to spend more than \$100 million annually on training. Add learning opportunity costs—the productivity lost when employees are removed from their jobs to the classroom—and that figure can easily double.

### DEFINITION OF TERMS

In this paper we use the terms "Learning Outsourcing" and "Learning BPO" interchangeably. We define them to mean the outsourcing of multiple, linked training processes or functions to a single provider.

Gartner Dataquest defines BPO as "the delegation of one or more IT-intensive business processes to an external provider that, in turn, owns, administers, and manages the selected processes."<sup>1</sup>

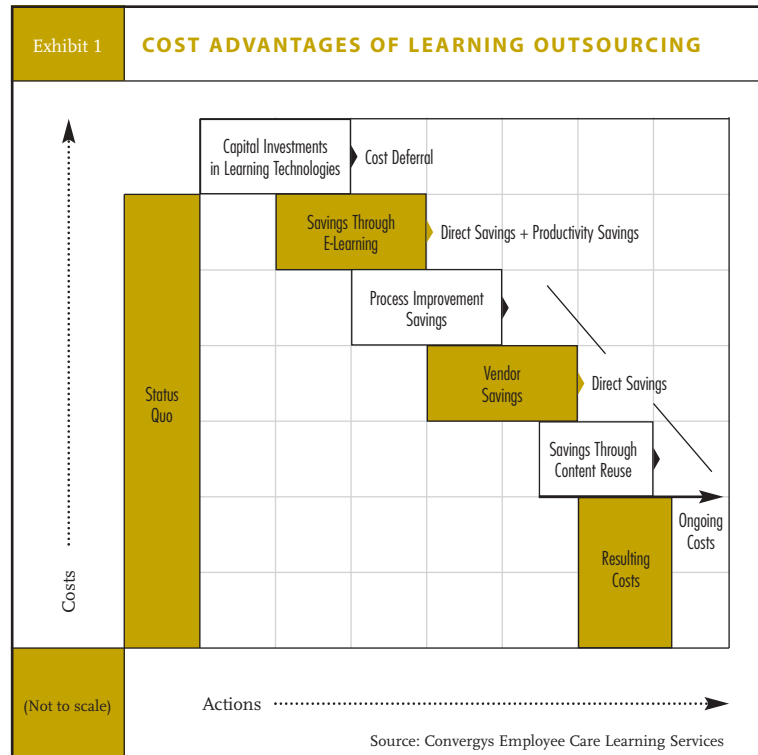
On pages 8 and 9 we compare approaches to learning BPO, and on pages 10 and 11 we discuss the processes we believe can be effectively outsourced.

Today's training organization supports a significant infrastructure of staff, real estate, vendor, and technology resources for the purpose of delivering learning services. BPO allows a company to recognize value by the reuse or elimination of such resource commitments, by taking advantage of the supplier's investment in infrastructure. *The experience of early adopters suggests that learning BPO may result in direct cost savings of 25 to 35 percent, together with equivalent indirect cost savings (primarily by decreasing the time employees spend in the classroom).* Major sources of cost reduction are pictured in Exhibit 1.

While the cost benefit is an important one, some companies also see investment in learning as a driver of competitive advantage; indeed, research by the American Society for Training and Development has demonstrated a positive link between investment in training and total shareholder return.<sup>2</sup> Companies we talk to expect strategic benefits from outsourcing in addition to cost savings, such as:

- Global deployment of learning.
- Higher and more consistent levels of service and availability of learning across the enterprise.
- Accelerated movement to shared services.
- Avoidance of administrative burden.
- Avoidance or deferral of up-front capital investments in learning technologies.
- Ability to leverage intellectual property to recognize value in the marketplace.
- Professional management expertise and better ability to measure, track, and benchmark.
- Objectivity and ability to drive breakthrough change.

The remainder of this paper will further develop the business case for learning outsourcing and describe why we believe it is a viable strategy for operationalizing the vision of corporate L&E.



## THE VISION OF CORPORATE LEARNING AND EDUCATION

Let us begin with a brief discussion of where HR and learning professionals are trying to take their corporations. While the task of educating a global workforce is enormously complex, and different firms in different industries have their own unique goals and challenges, the vision of most companies centers around several broad themes.

### LEARNER-CENTRIC, E-COMMERCE MODEL

Perhaps the key aspect of the vision for corporate education is to apply an e-commerce model to employee learning. Experts have long understood the value of tailoring learning to an individual employee's needs, but the classroom, the traditional vehicle for learning delivery, is an impractical medium to achieve this goal. Portals, combined with data mining technologies, allow for the creation of a "market size of one" whereby a learning offering can be proactively targeted at specific employees based on their individual needs. The Web, Internet, and intranet enable it to be delivered on demand, to the desktop, in real time. According to Gartner Dataquest, "By 2005, 45 percent of enterprises will enable some form of self-customization of learning by their employees."<sup>3</sup>

### GLOBAL AND ACCESSIBLE

While U.S. companies continue to focus growth strategies beyond North America, studies show that global employees receive only 15 to 25 percent of the training received in the U.S. This was a key goal for Nortel Networks: achieve a 10x increase in the availability of learning to non-North American populations.

The overarching issue for corporations is *availability and accessibility* of learning: even within the U.S., service levels may vary dramatically between business units. Companies want to reach the employees at the edges of the enterprise and to improve the volume of learning opportunities offered to everyone.

### INTEGRATED WITH EMPLOYEE AND HUMAN RESOURCE DEVELOPMENT PROCESSES

**Employee Development.** Learning professionals understand that a two-day training program (or two-hour e-learning program) can have no meaningful impact on employee performance unless it is integrated with job roles, competencies, performance management, and other elements of the employee development process. New learning and human capital management technologies offer the promise of horizontal integration with other HR processes, but few companies have had the time, resources, or energy to follow that path to its conclusion.

**Talent Management.** A large body of research demonstrates that the existence of innovative or high-quality learning opportunities can have a positive impact on both attraction and retention of employees. Management is looking to learning professionals to collaborate with their colleagues in HR to achieve a compelling, differentiated enterprise talent management strategy.

### RATIONAL, COST-EFFECTIVE, AND LEVERAGED

Executives continue to explore ways to measure the scope and effectiveness of learning, and to more effectively leverage resources and best practices across a highly decentralized function. Even if they have not yet quantified the opportunity, most understand that the current delivery system is costly and inefficient.

In the current state, accountability for spending is broadly distributed. Processes for budgeting, capturing, and recovering costs vary widely. An astonishing number of companies cannot even measure, with any confidence, what they spend on training—let alone where, why, and how effectively it is being spent. Those that have done so find that spending on training may equal the spending on all other HR services *combined*, and are demanding equal attention to the cost.

## CHALLENGES FACING LEARNING AND EDUCATION

Today's learning organization faces immense challenges in achieving this vision, stemming from the complexity of technology, the decentralization and disaggregation of the learning function itself, an escalating burden of administrative responsibilities, and a lack of funding and resources to make the up-front investments required for learning transformation.

### TECHNOLOGY

Corporations today face significant technology challenges and risks, because technology is such an important enabler of the vision for L&E. Technology enables e-learning, technology enables global delivery, and technology enables integration with other employee and HR development processes.

**Narrow Scope Definition.** Many companies begin change efforts by installing the technology infrastructure that enables learning transformation, but often do so without developing and gaining buy-in to a broader vision for enterprise change. The project scope is reduced to implementing technology, not the change it enables, and as a result the expected benefits are never fully realized.

**Complex Implementations.** Like any enterprise application, learning management implementations are long and arduous—regardless of what software vendors may claim. Often, to compensate for the complexity involved in an enterprise implementation:

- Process reengineering is delayed, and, in the end, never occurs. Savings projected from self-service, process automation, and consolidating or centralizing administration are never fully realized.
- The implementation is scaled back to a small pilot population, which proves nearly as difficult as a large-scale implementation, but without sufficient scale to deliver the benefits projected in the business case.
- System functionality is cut back to the basics, and never enhanced to the degree required—again—to achieve the benefits originally projected.

**Inexperienced Suppliers.** The supply chain for technology and e-learning is fragmented and immature. Players enter and disappear overnight. With one or two exceptions, the largest providers have only \$5 million to \$10 million in revenue. The entire industry isn't more than four or five years old, so no supplier or service provider can boast significant experience or true best practices. This is a frightening risk for clients, who are forced to make choices they aren't fully comfortable with and can end up paying with failed implementations.



**DECENTRALIZATION**

What creates the problems and dysfunction in learning is what makes it so difficult to achieve change: the decentralized, disaggregated, fragmented nature of the training function, which has evolved over a history of corporate restructurings, mergers and acquisitions, and local ad hoc needs. Fifty to 80 percent of training may live in business units and functions outside of HR (see Exhibit 2), and programs, technologies, and people are duplicated many times over. This is a costly and inefficient approach that results in widely inconsistent levels of service, works against the sharing of services or best practices, and stymies the implementation of any kind of shared enterprise strategy or agenda for learning. It also makes costs almost impossible to measure or control.

Exhibit 2		RESPONSIBILITY FOR LEARNING EXPENDITURES		
	Total Learning Expenditures	Learning Expenditures Owned by HR	Percentage Owned by HR	
Aerospace Company	\$300 million	\$66 million	22%	
Diversified Financial Services Company	109	37	34	
Telecommunications Company	95	23	24	
Electronics Company	50	15	30	
Specialty Chemicals Company	43	5	12	

Source: Convergys Employee Care Learning Services

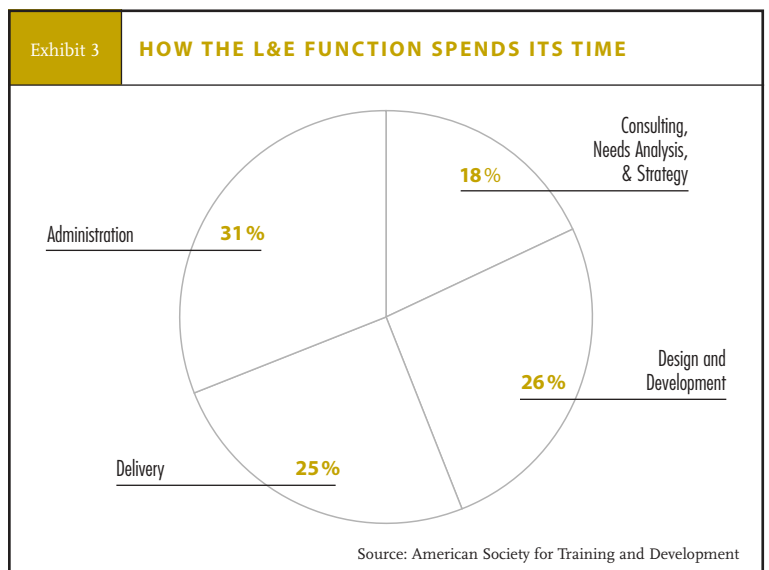
**ADMINISTRATIVE BURDEN**

Executives are asking L&E to function as business partners in helping implement strategy, accelerate change, and engage and develop talent. At the same time, studies show that one-third of staff time and effort in learning is consumed with administrative responsibilities: scheduling classes, registering students, scheduling facilities and instructors, maintaining databases, managing print and fulfillment, managing vendors, and so forth (see Exhibit 3). Like their colleagues in HR, learning professionals are having a difficult time reconciling the two roles, which require far different competencies.

**RESOURCES**

In order to fund its future vision, L&E is asking for investments—especially in technology—of an order of magnitude greater than anything they have ever requested. Even in a company spending \$50 million on learning, it is infrequent that any one department has a budget of greater than \$2 million, and learning infrastructure investments may be several times that figure. Moreover, they are capital expenditures, so the visibility is higher and the business case must deliver significant savings.

Even then, L&E (and HR more broadly) usually falls at the bottom of the pecking order for technology investments. The driving force behind the American Express HR and learning BPO boiled down to this one thing: *HR could not get funding for the technology investments it wanted to make.*



The same goes for IT resources: in very few companies is HR service delivery a top priority for IT. Learning is especially troublesome because in order to achieve high-quality, results-driven e-learning, L&E must provide engaging, media-rich content, which strains system bandwidth.

## WHY OUTSOURCE LEARNING?

We believe the fastest and cheapest way to learning transformation is through outsourcing. In outsourcing, the onus is on the supplier to invest in infrastructure, maintain and upgrade technology, provide top-quality service, manage down costs, and reengineer processes. At a minimum, companies should be considering outsourcing as one key element of their transformation strategy.

### SPEED

Central to the value proposition for learning BPO is the supplier's pre-investment in a multi-client infrastructure. This enables a client to accelerate its progress toward the kind of vision that has been described above, and mitigate many of the risks and challenges involved—especially those concerning technology. Key elements of a multi-client infrastructure include:

- Technology platform and technology integrations.
- Service center infrastructure and delivery capability.
- Best practice business processes.
- Supply chain infrastructure.
- Content distribution network.
- Global operations.

From a practical perspective, learning BPO works on the principle of mass customization: the supplier invests in an integrated technology and service solution that is customized to each client's unique requirements. Since it's faster to buy than to build, the cycle time to implement a solution is reduced.

From a change management perspective, BPO may become a catalyst that triggers a whole series of critical decisions around learning. Since it drives change across the corporation and carries considerable cost implications, these decisions are elevated to the C-suite, which can accelerate the decision-making process and may mobilize the executive sponsorship that is so important to getting business unit buy-in for change.

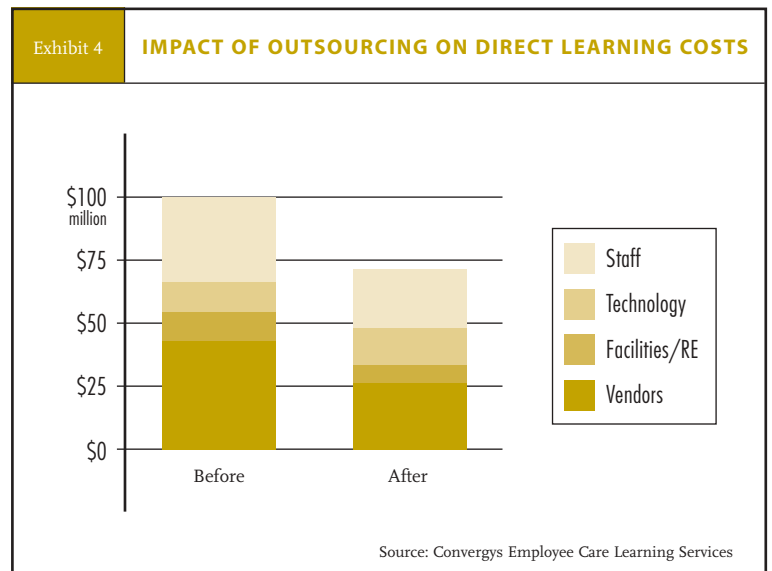


## COST

According to the experience of early adopters, learning outsourcing can affect cost in at least three ways.

**Reduce Direct Costs.** As mentioned earlier, the experience of early adopters suggests that aggressive commitment to learning BPO can result in direct, annual cost savings of 25 to 35 percent (see Exhibit 4). Primarily, savings are driven by:

- *Process improvement:* savings resulting from process reengineering, automating manual processes, installing or enhancing employee and manager self-service, and aggregating scale-driven activities into shared services.
- *Supply chain management:* savings resulting from vendor rationalization, aggressive vendor management, and the supplier's ability to get deeper discounts and more attractive terms from vendors based on commitments across the supplier's multi-client base.
- *E-learning:* savings achieved by accelerating the client's ability to realize the economic benefits of e-learning, which include reduced instructor fees, travel costs, facilities costs, and print and materials costs.



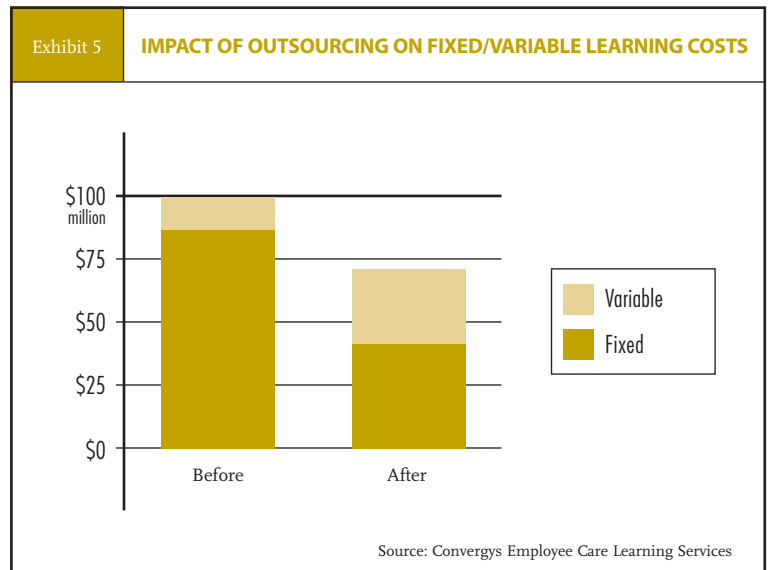
Other direct cost reductions available through learning outsourcing may include savings from the retirement of legacy technology applications, and decreased development costs associated with content reuse and standardization/centralization of learning design and development.

**Defer Capital Investments.** A second important financial benefit of learning outsourcing is the avoidance of substantial up-front capital investments in technology. Since the outsourcing supplier bundles all of its infrastructure and operating costs into an all-in, per-user/per-month fee, technology costs—which typically are lower due to the supplier's scale economies—are distributed over the life of the contract (normally five to seven years) rather than incurred at the outset.

In addition, to obtain the best price from learning technology providers, clients typically must commit to purchasing licenses for the equivalent of all employees in the corporation. In an outsourcing model, the client is charged only for the number of active users. Thus the client can scale up usage gradually, over time, rather than committing to an enterprise buy and then spending unproductive time trying to get other business units and functions to participate so the economics can work out.

**Shift Investment Risk.** A third, related cost benefit of learning outsourcing is that it shifts the client’s investment risk from a fixed cost to a variable cost (as pictured in Exhibit 5). In today’s learning organization, staff, facilities, and technology costs are fixed; vendor costs are variable, but many contracts protect vendors from low demand and may carry penalties if purchase targets are not met.

Moreover, because the responsibility in corporations for spending on learning is so broadly distributed—and the governance so decentralized—cost is very hard to impact or to control. This is an *inelastic* cost model that makes it difficult to respond to economic conditions. In an outsourcing model, the supplier bears the responsibility to downsize when economic conditions turn down and demand decreases, and to upsize when conditions improve and the demand for learning goes up.



**STRATEGY**

While BPO is often justified publicly on the basis of cost, studies show that companies who choose outsourcing are addressing a more strategic question: how much focus and how many resources should we be investing in non-core business processes? In the case of learning, they might also ask: how much should we be investing in the *back-office operations* associated with non-core business processes?

In describing learning as a non-core process, we do not imply that learning is a *non-strategic* process. In fact, one of the key benefits of outsourcing is the enablement of L&E to contribute *higher* levels of value to the corporation—as strategic partner, change agent, and talent manager—by divesting itself of the administrative burden associated with learning management and delivery. We have seen two distinct learning BPO delivery models to achieve this end, compared in Exhibit 6.

**Exhibit 6 COMPARISON OF LEARNING BPO APPROACHES**

Scenario	Process Reengineering	Delivery Infrastructure	Client L&E Staff	Supplier Interests	Client Benefit
<p><i>Transform-Transfer:</i></p> <ol style="list-style-type: none"> <li>Supplier reengineers client processes</li> <li>Service delivered through supplier’s existing service infrastructure</li> </ol>	Before transition	Supplier’s	Remain with client L&E	<ul style="list-style-type: none"> <li>Control service level</li> <li>Immediate profitability</li> </ul>	<ul style="list-style-type: none"> <li>Higher, more consistent service levels</li> <li>Net cost savings</li> </ul>
<p><i>Transfer-Transform:</i></p> <ol style="list-style-type: none"> <li>Supplier takes on all client staff and infrastructure</li> <li>Service delivered through client’s existing infrastructure for “interim” period</li> <li>Supplier reengineers client processes and migrates client to supplier’s infrastructure</li> </ol>	After transition	First client’s, then supplier’s	Taken over by supplier	<ul style="list-style-type: none"> <li>Acquisition of scale</li> <li>Immediate revenue</li> </ul>	<ul style="list-style-type: none"> <li>Substantial shedding of assets</li> <li>Net cost savings</li> </ul>

Source: Convergys Employee Care Learning Services

In both cases, the supplier and client agree on a set of processes and technologies to be outsourced. In the transform-transfer scenario, the supplier reengineers the client's processes, and delivers service through its own (the supplier's) multi-client infrastructure. In the transfer-transform scenario, the supplier takes on all client staff and infrastructure, delivers service through that infrastructure for an interim period, and later (one hopes) reengineers the client's processes and migrates the client onto the supplier's service infrastructure.

The first approach has been favored by suppliers who have an existing capability in other areas of HR or IT outsourcing and are looking to leverage that capability into L&E. This is good news for clients, because it reflects a core competency in running an operational business, which translates into a higher quality of employee care. The supplier is committed to being world-class in these processes and should have the capital to invest in continuously improving them.

The second approach has been used by new market entrants in outsourcing (especially Big Four-type consulting firms) in order to build scale. This approach may present a more substantial business case to the client in terms of pure shedding of assets and headcount. However, since it involves taking on existing client processes, which usually need to be reengineered, this scenario carries substantial risk both to the client (in terms of untested quality and service delivery) and to the supplier (in the form of low or even negative profitability).

## WHAT CAN BE OUTSOURCED?

What learning processes, functions, and technologies are legitimate candidates for outsourcing? Remember that L&E has always "outsourced" more than half of its program design and delivery to content vendors, but these efforts typically have been one-time or single-purpose projects or relationships and should not be considered BPO. Perhaps they can be described as "out-tasking."<sup>4</sup> Exhibit 7 describes our view, shaped in part by the experience of early adopters of learning outsourcing, of what can be outsourced to a single BPO supplier.

Exhibit 7 OPPORTUNITY AREAS FOR LEARNING OUTSOURCING		
DOMAIN	PROCESS/TECHNOLOGY	COMMENTS
TECHNOLOGY AND INFRASTRUCTURE	<ul style="list-style-type: none"> <li>• Learning management system</li> <li>• Learning content management system</li> <li>• Virtual learning environment</li> <li>• Business collaboration environment</li> <li>• Content distribution network</li> <li>• Standards compliance testing lab</li> <li>• System integrations to vendor partners</li> <li>• System integrations to HRIS and billing system</li> <li>• 24x7 multi-channel/multi-lingual service center</li> </ul>	Supplier's role is to: <ul style="list-style-type: none"> <li>• Integrate</li> <li>• Host</li> <li>• Maintain</li> <li>• Upgrade</li> </ul>
ADMINISTRATION AND OPERATIONS	<ul style="list-style-type: none"> <li>• Learner registration and cancellation</li> <li>• Learner advisory services</li> <li>• Learner case management</li> <li>• Class scheduling</li> <li>• Instructor, facilities, and resource scheduling</li> <li>• Class fill rate analysis, consolidation, cancellation, and wait list management</li> <li>• Class evaluation collection and archival</li> <li>• Class certificate preparation</li> <li>• Class roster distribution and archival</li> <li>• Print and fulfillment of course materials</li> <li>• Facilities management</li> <li>• Vendor management: sourcing, contracting, payment, quality control</li> </ul>	Supplier provides these services across the client's enterprise according to a shared services model
CONTENT DESIGN, DEVELOPMENT, AND DELIVERY	<ul style="list-style-type: none"> <li>• Program design and development</li> <li>• Program delivery</li> <li>• Conversion of classroom content to e-learning</li> <li>• Program/product management</li> <li>• Content vendor management</li> </ul>	<ul style="list-style-type: none"> <li>• Supplier may provide these services for non-strategic, non-proprietary programs</li> <li>• Client retains responsibility for strategic and/or proprietary programs</li> </ul>
STRATEGIC OPERATIONS	<ul style="list-style-type: none"> <li>• Strategic direction and governance</li> <li>• Needs analysis</li> <li>• Project management</li> <li>• Measurement</li> <li>• Delivery of strategic programs/interventions (e.g., executive development)</li> <li>• Performance consulting</li> <li>• Organization development and change management</li> </ul>	<ul style="list-style-type: none"> <li>• Client retains responsibility</li> <li>• Supplier provides data and measurements on costs and service levels</li> </ul>

Source: Convergys Employee Care Learning Services

This chart suggests that the supplier bears the responsibility for hosting, integrating, and maintaining technologies; the supplier provides administrative back-office services across the client enterprise; and the client retains control of strategic direction, governance, and needs analysis and strategic consulting. This is not markedly different from the HR outsourcing model in place at many corporations today.

However, L&E differs from HR in an important respect: L&E is a system for building the intellectual capital of the enterprise and contains an entire series of activities related to creating (or acquiring) and delivering that intellectual capital in the form of program content. What should be the supplier’s role in this value chain?

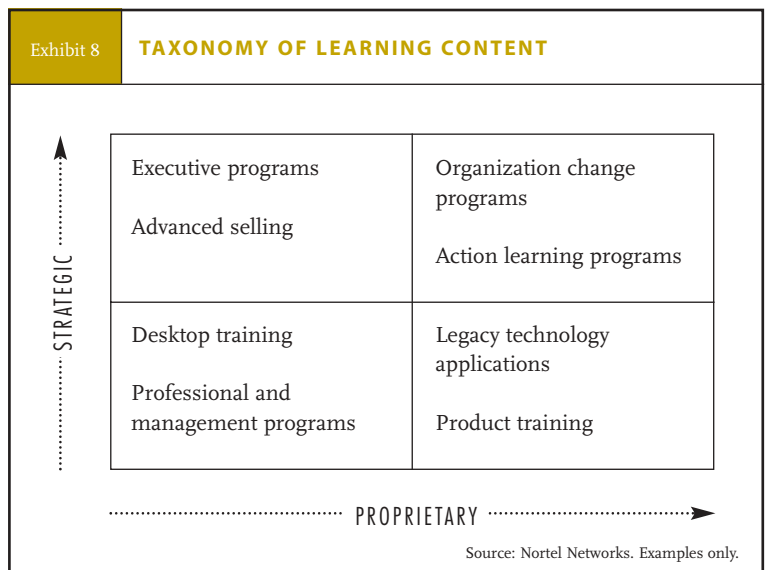
**ROLE OF THE SUPPLIER IN LEARNING CONTENT**

On the face of it, involvement in the content space goes beyond the traditional mandate of outsourcing, which normally focuses on transaction-based—as opposed to expertise-based—shared services. However, many companies find that a significant percentage of their current learning offerings are delivering non-strategic, non-proprietary content (as classified in the Taxonomy of Learning Content, Exhibit 8). This content is readily available on the open market and is not highly differentiated. Thus the client activities associated with these programs have mostly to do with sourcing, quality control, and ongoing vendor management, and can easily be outsourced.

Moreover, the programs in this low-low quadrant often are ready candidates for conversion to e-learning. It makes sense to outsource not only the ongoing management of these programs, but also their conversion, as appropriate, to e-learning or other blended learning formats that leverage available technologies.

One way the BPO supplier may achieve this is by building its own network of best-in-class content providers. The supplier negotiates favorable terms with these providers, who see the supplier as a distribution channel capable of placing large volumes of their programs across the supplier’s client base. The supplier fulfills its integrator role, while making available to the client best-in-class content and services. The supplier also bears the risks involved in finding reliable vendors in a volatile e-learning marketplace.

Other suppliers are eager to own the content development process for themselves. Consulting and IT services firms, who already employ hundreds of software developers and instructional designers, may vertically integrate this content development capability into their more traditional learning BPO proposition. In fact, since these firms work on a labor absorption business model, the real value of a learning BPO to them may lie in the content development domain. The challenge of this approach, for the client, is that a single supplier simply may not be the best or most cost-efficient provider for every kind of content.



## CONCLUSION

The business case for learning outsourcing is appealing. It promises significant savings, reduced capital expenditures, higher quality, better management, and increased control.

While executives are attracted by learning BPO's growing potential, some have been tentative to commit fully to it. We believe this is due primarily to three factors:

- The learning BPO solution involves significant, enterprise-level change.
- There is no centralized buyer for learning; the decision-making process is extremely complex.
- Corporate L&E staff, who may see the value of an enterprise solution, are reluctant to advocate changes that may put them personally at risk.

In a developing market, these factors hold considerable sway. However, as learning outsourcing continues to gain market acceptance and build a track record, the awareness of its benefits will increase, and executives will have a better understanding of what is possible for L&E. As more early adopters emerge, they will create models and best practices for managing enterprise-level change in learning, making it easier for those following in their footsteps to make the commitment to BPO.

Forward-thinking L&E and HR staff we talk to already are considering BPO as at least one key element of their learning strategies. Corporations who are involved in broader HR transformation efforts appear to be especially amenable to tackling L&E, according to Gartner Dataquest research.<sup>5</sup> In many ways, such companies define the ideal prospect for learning BPO:

- They have a goal of reducing HR costs.
- They are involved in other e-HR and employee self-service projects.
- They may be having difficulty getting resources or support for HR technologies.
- They already are bought into the shared-services concept.
- They may already be outsourcing other HR functions, such as health and welfare, staffing, payroll, pension, and 401(k) processing, and understand the benefits.

For this kind of prospect, and others on the vanguard (or in dire straits), learning BPO holds great potential to help the corporation achieve its vision for learning, overcome the challenges it is facing in getting there, and do so faster, with better quality, and at lower cost.

**NOTES**

- (1) "Business Process Outsourcing at the Crossroads," Gartner Inc., January 31, 2002.
- (2) "Profiting from Learning: Do Firms' Investments in Education and Training Pay Off?" American Society for Training and Development, September 2000.
- (3) "E-Learning Strategy: Different Stakeholders, Different Perspectives," Gartner Inc., April 26, 2001.
- (4) Garry DeRose makes the distinction in *Outsourcing Training and Education* (American Society for Training and Development, Alexandria, VA, 1999).
- (5) "HR Outsourcing: Time to Deliver Results," Gartner Inc., March 26, 2001.

## ABOUT THE AUTHORS

THOMAS J. STARR is Senior Principal of Convergys Employee Care Learning Services, which provides outsourced learning services and technology to corporations and public institutions. Tom has 18 years of experience in organizational learning and workforce education. He has been an industry leader in applying business, organizational, and financial disciplines to the training and education function, and has been an early proponent and practitioner in designing shared-service and business process outsourcing functions for learning. Previously, Tom held executive positions in a Big Four consulting firm and a leading instructor-led training company. He can be reached at (610) 891-6580 or [thomas.j.starr@convergys.com](mailto:thomas.j.starr@convergys.com).

GREG LUCKOCK is Senior Principal and co-leader of Convergys Employee Care Learning Services, where he is focused on product development, technology strategy, and engagement economics. Greg brings over 15 years of experience helping clients manage the organizational impact of their large-scale human capital development initiatives, and was a key player in two of the industry's first and largest learning outsourcing engagements. Greg also served as president of Software Academy, a corporate training company offering desktop productivity and network certification courses across the U.S. He can be contacted at (972) 491-9744 or [gregory.t.luckock@convergys.com](mailto:gregory.t.luckock@convergys.com).

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CONVERGYS EMPLOYEE CARE  
8000 Baymeadows Way Jacksonville, FL 32256  
Tel: 800 344 3000 Fax: 904 636 3649 e-mail: [HRPartner@convergys.com](mailto:HRPartner@convergys.com)