Jeff Cobb: [00:00:00] Finding the right balance of online and offline learning to have in its portfolio is one of the critical concerns facing a learning business in our post-pandemic world because getting that mix as close to ideal as possible is key to securing a learning business's reach, revenue, and impact.

Celisa Steele: [00:00:24] I'm Celisa Steele.

Jeff Cobb: [00:00:26] I'm Jeff Cobb, and this is the Leading Learning Podcast.

Celisa Steele: [00:00:34] Finding balance is a recurrent theme for me and for many. There's the much-talked-of life/work balance. There's the balance between strategic, deep thinking and operational, get-it-done time. There's the balance of effort and time for rest.

Jeff Cobb: [00:00:51] And, in the learning business world, there's also the balance of online and offline offerings, and that's what we want to focus on in this episode, number 415. We know from conversations with learning business leaders, observation of what's going on, and our own experience offering both online and offline experiences that cracking the nut of the right mix of online and off in a portfolio isn't easy.

Celisa Steele: [00:01:20] While balancing online and off has been an issue ever since online learning took off, the trickiness of balancing the two has become even trickier post-pandemic. On top of that, there's not a one-size-fits-all answer to the right balance. Some organizations are back to pre-COVID attendance at their in-person education and conferences. Others are struggling to get folks to attend in person—and, in the meantime, losing money on food and beverage, hotel room blocks, and all of that.

Jeff Cobb: [00:01:54] Yes, so it's probably worth laying a foundation here with some of that context that surrounds this now before we take a closer look at how you might balance things. First of all, we did see that tremendous shift to online learning during COVID-19. It was

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obviously already there. But, for folks who had not gone fully into that world, it really forced the shift for learners and for learning businesses.

Celisa Steele: [00:02:23] Right. Even holdouts, whether on the learner side or on the learning business side, even those folks who hadn't tried or spent much time with online learning, suddenly were essentially forced to buy into online learning and to try it out. If they wanted to learn, that was pretty much the only option for a time.

Jeff Cobb: [00:02:42] Some organizations got caught out that they didn't really have the technology in place. Maybe they had some basic infrastructure, but when it came time to really get serious about offering online learning, they needed to either put an LMS in place or come up with better ways to handle the technology end of things. So a lot of organizations, a lot of learning businesses were really scrambling.

Celisa Steele: [00:03:03] And, because of that scrambling, sometimes the quality of the offerings wasn't always of the highest caliber.

Jeff Cobb: [00:03:10] That's putting it politely.

Celisa Steele: [00:03:12] But there was a lot of leniency for a time. I think learners were hungry for connection, hungry to continue learning, and so, if the option was something slightly less buttoned-up and perfect online, they were willing to go with it. I think, though, we are now past that point of learner leniency.

Jeff Cobb: [00:03:34] That's right. We are also at a point of a return to in-person learning. We no longer have the restrictions that were preventing that during the COVID time. We know many organizations are returning to face-to-face events, and some are struggling with that. Some aren't getting the attendance levels that they used to, which is something that's part of what sparked this conversation—that is, how to actually navigate that. There're really varying levels of experience. Some are seeing a complete return to those pre-COVID levels.

Celisa Steele: [00:04:06] Or even higher.

Jeff Cobb: [00:04:06] Even higher because people were so eager to get back together. But then others are finding that, well, our audience discovered that online learning actually works, and we're going to have to do more with it going forward.

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Celisa Steele: [00:04:18] Right. And so, in terms of returning to in-person, there are some of what are perceived as benefits to in-person or things that can be done better in-person, like networking, hands-on experiences, potentially experiences that really yield deeper engagement. There's certainly a bias toward thinking that those are better handled in person. But in-person tends to come with higher costs, more logistical issues, and potentially ongoing health concerns for some attendees around what it means at this point to gather in one room with many other people.

Jeff Cobb: [00:04:58] Right. Another factor that I feel like there was more of a buzz about, maybe a few years ago, than I hear now—maybe it's still out there, and I'm just not hearing it as much—but just the environmental concerns, having, holding green meetings. There's so much air travel, so much waste that goes on with in-person meetings. Those are among the challenges, the potential downsides of in-person.

Celisa Steele: [00:05:20] That's a little bit of the background and the context. We had COVID pushing everything online for a period. Now that in-person is a viable option again, this question of what is the right balance, what's the right mix between online and off is bubbling up. We hear a lot about it. And so what we wanted to offer is nine criteria that your learning business might be thinking about when you're trying to decide what is that right mix. We're going to offer these nine criteria and some guiding questions. You can use this essentially like a rubric. There can be a rating for each criterion, and that can yield an overall score. We'll talk a little bit more about that after we get through the criteria.

Jeff Cobb: [00:06:03] We should note at the beginning too that, of course, we always have a transcript. We have a show notes page for our podcast episodes. Listen now, absorb what you can of this, but then you will have that as a point of reference, something you can use for your own review. Or we'd love for you to use these types of resources as a discussion item, as a social learning object with your team, with your staff, with your organization. We'll start off with criteria one, which is audience preferences, behaviors, and needs. We've got that *p* word, *preferences*, in there, so we're going to be careful about how we handle that one. We often hear from organizations, "We went out and asked them what do they prefer in terms of, in this case, online versus face-to-face?" Of course, you often can't trust stated preferences.

Celisa Steele: [00:06:52] That's right. Some of the guiding questions here are, or you can ask, "What are the preferences of our target audience for this offering?" Again, Jeff, you just said that preference, though, is going to be not totally reliable. You also want to make sure that you're either asking about behaviors or that you're actually observing behavior. You can ask

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them, "How many online offerings have you completed in the past 12 months? Or "How many in-person events have you completed in the last 12 months?" There are ways to get at not preference but actual behavior.

Jeff Cobb: [00:07:27] This is a big part of what we do when we survey. We're really trying to get at those behaviors, or what might be referred to as exhibited preferences, things that, as you said, Celisa, we can observe. We can see that they've done this, not that we're asking them. This is what they prefer.

Celisa Steele: [00:07:41] And so, often, here, you're going to also want to be asking, "Have we conducted surveys, or have we gathered feedback that will tell us about the behaviors and the preferences?" And then, importantly, "When have you gathered that data and that feedback?" Because I feel like, at this point, pre-pandemic data is of limited use.

Jeff Cobb: [00:08:01] Yes, that's a big flag to a lot of organizations. If the last time you did this kind of surveying was pre-pandemic, it's time to go back out again.

Celisa Steele: [00:08:10] And then, related to this idea of exhibited preferences, you can also look at what data you have around past attendance and past engagement levels in your online offerings compared to your offline offerings.

Jeff Cobb: [00:08:24] So you might be doing a rating scale sort of thing. We know our friend Will Thalheimer does not like these types of scales.

Celisa Steele: [00:08:31] Likert scale.

Jeff Cobb: [00:08:31] Likert scales. But we do find them useful in certain instances, and we think they're useful in this instance. You could do a 1-to-5 scale with your own check on this. What are strong exhibited preferences for online? What are moderate preferences for online—neutral or mixed preference? Moderate preference for offline? Strong preference for offline? And engaging, to what degree do you see the behavior exhibited across that spectrum?

Celisa Steele: [00:08:58] Right. You simplified and said preference, but we're really meaning that exhibited preference. So really trying to look at past behavior as much as possible. And then those five categories that you just ticked off, Jeff, essentially, then have numerical ratings from 1 to 5. The numerical rating will be important when we come to the end and are looking at using this as a rubric, using these different scores on criteria for that. But the second criterion has to

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do with content alignment, and the guiding questions you want to be asking here are "Is the content highly interactive or hands-on, requiring or certainly indicating a desire for face-to-face interaction?"

Jeff Cobb: [00:09:43] And then, along with that, "Can the content be effectively delivered through digital means, such as a Webinar, a self-paced e-learning module, or other types of typical online delivery?"

Celisa Steele: [00:09:55] Again, you would use those guiding questions to assess that content that you're trying to decide, whether it would be offered online or off. And you can use, again, a 5-point rating scale. 1 would be best suited for online. 2 is suitable for online but might need some adaptation. 3 can be delivered in either format—online or off. 4 suitable for offline, but maybe with some adaptation. And then, fifth, best suited for offline—or number 5, I should say.

Jeff Cobb: [00:10:26] I think it's important in this scale to challenge yourself a bit because I think a lot of times we default to, "Oh, that can't be done online." Well, think about it. Think about whether, if you could have the right adaptations, whether you might be able to deliver a valid and worthwhile learning experience for whatever objective you're trying to achieve online. We should probably say too, as you're applying these scales, these rubrics, this might be you, as the head of your learning business, thinking through these things. More likely, it might be a team sitting down and looking at these and saying, "How do we rate ourselves on these different scales?"

Celisa Steele: [00:11:00] And, if you do it as a team, we recommend that—you can be together, and you can be walking through the criteria and the guiding questions—but we recommend that you let each person rate individually and then share those scores collectively, and then maybe you come up with a group rating. But, if you, especially as the learning business leader, state your preference and say, "Well, I think this is clearly a 1," odds are that others on your team then might go, "Yes, yes, 1." Whereas, if you instead allow time and space for everyone to think and assess on their own, then you might actually find out, wow, we all have different opinions, and then that could lead to some good discussion of why do some people feel like this is best suited for online, and others feel like it's best suited for offline.

Jeff Cobb: [00:11:41] Yes, I guess you would call it a best practice around research. We already said we don't ask people to state their preferences because we just know we can't trust that. And, whenever we're doing anything that's going to involve group input, which is often very

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valuable, we want to do everything we can to avoid groupthink and get people to do their individual thinking and document it before they come together as a group.

Celisa Steele: [00:12:03] The third criterion has to do with resource allocation and cost. Some of the guiding questions under this criterion are "What are the cost implications for online versus offline delivery?" So you want to be thinking about venues, travel, and accommodation versus technology infrastructure and digital content creation.

Jeff Cobb: [00:12:26] And then another one in this area is "What is the potential return on investment (or ROI) for each format?" Of course, that may require doing a little forecasting, some financial projections. I'll point out here, this is one of those areas where, if you can deliver it effectively online, and the audience wants it online, that can be a great thing from a return-on-investment standpoint because your margins, your incremental profits online are typically going to be much higher than they're going to be with face-to-face.

Celisa Steele: [00:12:53] And so, then, the rating scale for this criterion again, 1 to 5. 1 could be online is significantly more cost-effective. 2, online, somewhat more cost-effective. 3, the cost differences are minimal, essentially the same cost, to delivering it online versus offline. 4, offline is somewhat more cost-effective. And then, 5, offline is significantly more cost-effective.

Jeff Cobb: [00:13:17] Three criteria so far. We've talked about preferences and behaviors. We've talked about content alignment as the second one. And we've talked about the third one as being resource allocation and cost. Criteria four is going to be technological infrastructure, and this is also a capacity question.

Celisa Steele: [00:13:36] That's right. Three, around resource allocation and cost, that falls under capacity. This has to do with your human resources and what investment you might already have in place in some of your tools. Number four really puts the spotlight firmly on the technological infrastructure required for this. So, again, that falls under that capacity domain that we talk about in the Learning Business Maturity Model. Some of the guiding questions here are "Do we have the necessary technology and support to deliver high-quality online learning experiences?" And answering that question could point you to the need to invest in new or additional technology or additional support, for example.

Jeff Cobb: [00:14:22] And then another question "Is our audience comfortable and proficient with the required technology?" I see organizations make a lot of assumptions there. It may be that their audience is not as technically proficient as they actually are. So avoid assumptions.

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Make sure you truly find out. Our rating scale there is going to be 1, our technology supports an excellent online experience. 2, our technology supports a good online experience. 3, our technology supports online and offline equally. 4, our technology is mostly oriented to offline experiences. And then, 5, our technology is only oriented to offline experiences.

Celisa Steele: [00:15:12] At Tagoras, we partner with professional and trade associations, continuing education units, training firms, and other learning businesses to help them to understand market realities and potential, to connect better with existing customers and find new ones, and to make smart investment decisions around product development and portfolio management. Drawing on our expertise in lifelong learning, market assessment, and strategy formulation, we can help you achieve greater reach, revenue, and impact. Learn more at tagoras.com/more.

Celisa Steele: [00:15:51] And then the fifth criterion has to do with safety considerations. We're thinking about safety relatively broadly here. But one of the guiding questions is around "What are the current safety risks, and how might they impact in-person events?" We're thinking of things like weather. We heard recently from someone whose annual conference was in Houston when the tornadoes went through, and several hotels in the area lost power and things like that. Luckily, it didn't impact their conference, but that's the kind of concern that you might need to take into account. There are also health concerns. Obviously, we started the episode talking about COVID-19. If something like that happens again, there can be true risks to gathering in person. There might also be the potential for political unrest, depending on where your in-person event is situated. So being aware of the safety risks that bringing together a group of people to learn could potentially entail.

Jeff Cobb: [00:16:53] And then a question to go with that is "Are there safety concerns among our audience?" Are people tuned into any of these concerns? How much do they care about them? How much do we really need to be taking these into account? It's important to know.

Celisa Steele: [00:17:06] And so the rating scale here, 1 to 5. 1, that there are significant safety concerns, which would favor online delivery. 2, some safety concerns that would favor online delivery. 3, minimal safety concerns, so either format would be feasible.

Jeff Cobb: [00:17:25] Then 4, some safety concerns favoring offline. And 5, significant safety concerns favoring offline. Some of the things we have in mind here with some or significant safety concerns are, for example, if you're running, say, labs that involve dangerous chemicals or that involve things like power tools or using electricity, things that need to be supervised,

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monitored, and guided properly. You don't want to just have an on-demand video saying, "Hey, try this welding tool out" without having the right person there to support that. So those would favor offline circumstances.

Celisa Steele: [00:18:00] You have to weigh your safety concerns because, to your point, Jeff, some safety concerns, like perhaps a pandemic, will point towards online. Other safety concerns, as you were saying, like with chemicals or power tools, might favor offline. You'll need to think particularly about your offering and where that points you in terms of where the safety risk is lowest.

Jeff Cobb: [00:18:20] That was number five, safety concerns. Criterion number six is engagement and networking opportunities. And a question you would ask here, one of them is, "How important is face-to-face interaction for this particular course or conference or name your type of learning experience?"

Celisa Steele: [00:18:40] Another guiding question is "Can we replicate—or can we even enhance—those kinds of interactions using online tools and online strategies?"

Jeff Cobb: [00:18:49] I think this is another one where we need to stretch ourselves and think about what really is possible, both online and offline, in terms of the engagement and the networking, and not make any assumptions. I think we automatically make an assumption that more networking is going to happen offline. But I've recently been to conferences, and I know that there's a significant number of people there who may never talk to anybody the whole time they're there, but, if they were in an online situation, they might actually have a lot of engagement, a lot of interaction. So we have to be thinking about those things. The rating scale here. 1, engagement or networking are easily replicated online. 2, engagement or networking somewhat replicable online. 3, engagement/networking equal in both formats.

Celisa Steele: [00:19:34] 4 engagement and networking somewhat better offline. And 5, engagement and networking somewhat better offline.

Jeff Cobb: [00:19:41] Significantly better.

Celisa Steele: [00:19:42] Excuse me. Significantly better offline, yes. So that's the sixth criterion. That brings us to seven, which has to do with accessibility and inclusivity. And guiding questions here include "Which format makes the course or conference more accessible to a wider audience?" And so you're going to be wanting to consider things like geographic reach.

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You're going to be wanting to consider disability accommodations. You want to consider time zone flexibility.

Jeff Cobb: [00:20:11] Yes, these are really important. I'm on a board right now of an organization that has an international reach, and those geographic questions—and also socioeconomic questions that can go with them—are big because we offer programs that are relatively expensive and tend to be geared towards American and European audiences. But we have large constituencies in other parts of the world that may not be able to travel to the face-to-face versions of those events, may not be able to afford what we're charging for some of those events, but have a real need.

Celisa Steele: [00:20:44] The rating scale for accessibility and inclusivity goes from 1, online is significantly more accessible; 2, online is somewhat more accessible; 3, accessibility is equal for both formats; 4, offline is somewhat more accessible; and 5:, offline is significantly more accessible.

Jeff Cobb: [00:21:05] That's accessibility and inclusivity—very important to keep very front of mind. And then criterion eight—maybe one of the ones that's closest to my heart—is learning outcomes and feedback and thinking about those in the context of offline and online experiences. A key question here might be "How have learner outcomes and satisfaction levels differed between online and offline formats in the past?" Hopefully, this is something you know.

Celisa Steele: [00:21:39] Right. Again, the past, though, probably needs to be a relatively short past.

Jeff Cobb: [00:21:44] That's true.

Celisa Steele: [00:21:44] You might need to be looking at just post-pandemic numbers there to get an accurate read or as accurate a read as possible. And then, even in what you said, Jeff, in that question, we grouped outcomes and satisfaction levels together. Ideally, you're actually separating those out.

Jeff Cobb: [00:22:01] Yes, definitely.

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Celisa Steele: [00:22:01] You're really looking at learning outcomes differently than you're looking at satisfaction levels because I think we all know that you can sometimes get a very highly rated experience where people don't go back with much to apply.

Jeff Cobb: [00:22:14] Right. There's the "Did you like it?" question, and then there's the "Did you actually learn anything?" assessment.

Celisa Steele: [00:22:20] You want to be looking at both and, we would say, putting more weight on the outcomes rather than on the satisfaction level, on the smile sheet level of feedback.

Jeff Cobb: [00:22:30] Definitely. And, related to that, "What feedback have we received about that effectiveness of each format?" Like you said, Celisa, we've got to make sure we're not looking too far back on that.

Celisa Steele: [00:22:42] The rating scale here is 1, online consistently yields better outcomes. 2, online often yields better outcomes.

Jeff Cobb: [00:22:52] 3, outcomes are similar in both formats. 4, offline often yields better outcomes. And 5, offline consistently yields better outcomes. Yet again, I will say this is a place not to make assumptions. I think there still tends to be this bias that learning is going to happen better in offline environments, but there is substantial evidence that learning can be equal or even better in online environments. So you have to walk into this with that understanding.

Celisa Steele: [00:23:23] And then the final criteria that we'll mention today is environmental impact. Jeff, you mentioned near the beginning of our conversation this idea of green meetings, which we felt we maybe heard more about in the past than we have of late. But, in general, considering the environmental impact we think is important for learning businesses to be doing. Guiding questions are things like "What is the environmental impact of each format, meaning online versus offline?" And so you're going to want to be looking at factors like carbon footprint, energy consumption, and waste generation. How much trash are you producing?

Jeff Cobb: [00:24:00] And then, of course, ask, "How can we minimize our environmental footprint while delivering high-quality educational offerings?" I'm going to sound like a broken record, but this is, again, not an area to make too many assumptions because online is not necessarily off the hook totally when it comes to environmental impact. A lot of server energy is required to be the backbone of the Internet that's running all of these interactive experiences. That's becoming truer as AI becomes a bigger component of learning experiences. That said,

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probably in the balance, online is typically going to be more environmentally friendly, but you need to weigh it on our rating scale.

Celisa Steele: [00:24:41] And so that ranges from 1, online format has significantly lower environmental impact. 2, online has somewhat lower environmental impact. 3, the environmental impact is similar for both formats.

Jeff Cobb: [00:24:54] 4, the offline format has somewhat lower environmental impact. And 5, the offline format has significantly lower environmental impact. With number 5 in particular, I think, if it's easy to get a group of people together locally—not really have to do much to do it—that's a no-brainer in terms of environmental impact versus the amount of energy that might have to be expended with servers and everything else to stand up something online. But my guess is that's probably the exception more than the rule in this area.

Celisa Steele: [00:25:24] Those are the nine criteria that we brought to the table today. If you use the scoring that we talked about with each question, then what you can do is sum up the scores for each to get a total. If your total is in that 9 to 18-point range, that's going to be indicating online pretty strongly. 19 to 27, that's going to be moderately favoring using an online format. 28 to 36, that's neutral or mixed, so probably either format could work. 37 to 45, that's going to be moderately leaning towards offline. And 46 to 54, that's going to be strongly favoring offering it offline.

Jeff Cobb: [00:26:10] We'll stress that, as with any rubric like this, your overall score probably shouldn't determine your choice. Judgment has to be applied, obviously, within your particular context. But it can point you in the right direction. And an approach like this gives you a structured way to think about this decision with others, discuss it with others that are involved in the decision, or even just on your own. It gives you that more structured way of thinking about it.

Celisa Steele: [00:26:39] We encourage you to make this your own, to adjust the criteria. Maybe not all nine of what we mentioned feel important or relevant to your learning business. Maybe there are others that you feel are missing and that you would want to add. And, of course, you can also adjust the ratings along with the criteria to fit your learning businesses as much as possible and tailor this to your needs. That rubric and those criteria that we just went through really speaks to making product-by-product decisions, perhaps product line-by-product line decisions. But, beyond that, there's also the question of the overall balance of online and offline offerings in a learning business's portfolio.

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Jeff Cobb: [00:27:23] Yes, so you want to evaluate your current balance of online versus offline offerings. You want to ensure that you've got a diverse mix that's going to meet the varied needs, behaviors, and preferences of your audience.

Celisa Steele: [00:27:39] You're going to want to think about what can you do to make your approach as defensible and flexible as possible, so that, if things change, if the situation changes, how might you be able to pivot quickly between formats? I think that's something that a lot of organizations did learn during COVID, about how can we take, essentially, the same materials and potentially deliver them through a series of online-synchronous, instructor-led sessions? We can also then do that in person when we are able to meet in person. But thinking about how do you develop in a way that allows you to pivot as much as possible?

Jeff Cobb: [00:28:20] Yes, this is, I think, the core value of content, the intellectual property, the sort of stuff of any course, in and of itself—we've had this discussion before that it's tending to or trending towards zero in terms of market value. It's really the experience that you put around that content. When you're talking about offline versus online, you're structuring different experiences, and you can do that around the same body of content. Depending on choices you make—instructionally, structurally, and everything else—you can take that same core content and have a fantastic offline experience, have a fantastic online experience. They may have different objectives to them, they may be aimed at different audiences, but that's the kind of flexibility and adaptability that you have when you're really considering this online versus offline.

Celisa Steele: [00:29:09] Really focusing on that flexibility and adaptability probably makes the most sense when your score is more in that mid-range, where either format could probably work. That might be the types of offerings where you really want to make sure it is easy to move between the two. You might even suggest, perhaps, a hybrid approach where some aspects of the learning experience are happening in person but others are also happening online. So it can be an interesting way to think about the middle ratings. If your scores aren't clearly pointing you towards online or offline, there can be this focus on adaptability and flexibility and also the potential for a blended solution.

Jeff Cobb: [00:29:52] We should stress this is not a one-and-done deal. Like just about everything in the world of learning, this is a process, not an event. You need a continuous feedback loop around your portfolio of offerings. You're going to need to regularly gather and analyze feedback from learners to help you adjust that balance between online and offline and improve

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your offerings. Of course, be prepared for those big changes that come along, like—we talked about earlier—COVID was.

Celisa Steele: [00:30:23] And then you're also going to need to plan for sustainable investments. Be thinking about what capacity you already have and where you might need to add capacity, in terms of online platforms or resources, different staffing needs, or different contractor relationships. You just want to make sure that you are in a position to be able to execute on the appropriate formats in your portfolio and that you're really allocating resources effectively to help you maintain that portfolio that's going to have impact, be balanced, and be attractive to the learners you want to serve.

Jeff Cobb: [00:31:12] Finding the right balance of online and offline learning to have in its portfolio is one of the critical concerns facing learning businesses in our post-pandemic world because getting that mix as close to ideal as possible is key to securing a learning business's reach, revenue, and impact.

Celisa Steele: [00:31:34] At leadinglearning.com/episode415, you'll find show notes, a transcript, and options for subscribing to the podcast. If you haven't yet subscribed, please do take a moment to do that.

Jeff Cobb: [00:31:45] And we'd be grateful if you would take a minute to rate us on Apple Podcasts or wherever you listen, especially if you enjoy the show. Celisa and I personally appreciate reviews and ratings, and they help the podcast show up when others search for content on leading a learning business.

Celisa Steele: [00:32:01] And please spread the word about Leading Learning. You can do that in a one-on-one exchange with a colleague or through social media. In the show notes at leadinglearning.com/episode415, you'll find a link to connect with us on LinkedIn.

Jeff Cobb: [00:32:15] Thanks again, and see you next time on the Leading Learning Podcast.

[music for this episode by DanoSongs, www.danosongs.com]

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