

**DAY 1 – Tuesday, November 16, 2010**

- 
- 09:30 - 10:15am Breakfast / Wakeup / Gather
- 10:15 - 10:55 **WELCOME and INTRODUCTIONS**  
**Pat Durante**, *CEdMA President; Director of Training, Netezza*
- 11:00 – 11:55 **CONFERENCE SESSION #1**  
**Using Social Media in Learning**  
**Norman Buckberry**, *Sr Manager, ATC Program, Autodesk*  
**David Coughanour**, *Course and Test Development Manager, Novell*
- 12:00 - 12:55 **CONFERENCE SESSION #2**  
**Shaving Money from your Training Budget With Offshore e-Learning Development**  
**Barbara O'Brien**, *Member in Transition*
- 1:00 – 1:45pm LUNCH & NETWORKING
- 01:45 - 02:40 **CONFERENCE SESSION #3**  
**Managing a Team of Geographically Dispersed SMEs**  
**Darrell Walker**, *VP, Global Education, Computer Associates*
- 02:45 - 03:40 **CONFERENCE SESSION #4**  
**Designing Optimal Curricula to Meet Business Goals**  
**Spencer Cutting**, *VP, Curriculum Development, Parametric Technologies*
- 03:45 – 04:15 BREAK & NETWORKING
- 04:15 – 05:10 **CONFERENCE SESSION #5**  
**Classes to Adoption Offerings - Growing the Education Pie**  
**Kevin Hanegan**, *Director, Educational Services, TIBCO*
- 5:15 – 06:15 **CONFERENCE SESSION #6**  
**Training Course Prerequisites – Require Them or Waive Them?**  
**Beth Naczkowski**, *Director, Worldwide Education, F5 Networks*
- 07:00 Dinner and Fun at **Prezo Grille & Bar** – 229 E Main St, Milford, MA,  
+1 (508) 634-0101, 7 minute drive from EMC.
-

**DAY 2 – Wednesday, November 17, 2010**

- 
- 08:30 - 9:15am Breakfast / Wakeup / Gather
- 9:15 – 10:10 **CONFERENCE SESSION #7**  
**Good, Fast and Cheap – Choose All Three with Video-based Training**  
**Jim Fuller**, Sr Director, Education Product Development, NetApp
- 10:15 – 11:10 **CONFERENCE SESSION #8**  
**An Education Six-Pack: Tips for Creating and Implementing Training Packages**  
**Natasa Koledin**, VP, Worldwide Education, Endeca
- 11:15 – 12:10pm **CONFERENCE SESSION #9**  
**Impactful Measurement Of Your Business with Metrics Dashboards**  
**Eric Kelleher**, VP, Products & Training, salesforce.com  
**Lynn Marie Viduya**, Director, Global Education Services, NetSuite
- 12:15 – 1:10 **CONFERENCE SESSION #10**  
**Comparing Approaches to Certification Testing**  
**Liz Burns**, Sr Manager, Global Certification, Juniper Networks  
**Joe Cannata**, Manager, Certification Programs, Brocade  
**Beverly Van de Velde**, Manager, Global Certification and Accreditation Programs, Symantec
- 1:15 – 2:10 LUNCH & NETWORKING
- 2:15– 2:25 **CEdMA Business Meeting & Officer Reports**
- 2:30 – 3:25 **CONFERENCE SESSION #11**  
**Defending your Educational IP: 5 steps to ensure “The Price is Right?”**  
**Joe Cannata**, Manager, Certification Programs, Brocade (Moderator)  
**Panel:**  
**Dirk Braume**, CEdMA Services Trustee; Vice President, Education and Partner Programs Worldwide, Alcatel-Lucent  
**Peter Broderick**, VP, Education Services & Service Business Development, Kronos  
**Sarah Sedgman**, Senior Manager, WW Customer Education & Operations, Business Analytics, IBM  
**Harvey Shaw**, Manger, Remote Learning, Brocade
- 3:30 – 3:40 BREAK & NETWORKING
- 3:45 – 4:45 **CONFERENCE SESSION #12**  
**The Value of a Buck**  
**Tom Clancy**, VP, Education Services, EMC
- 4:45 – 5:00 Conference Review and Wrap-Up Unfinished Business
-

## SESSION ABSTRACTS

---

### Using Social Media in Learning

*Norman Buckberry & David Coughanour*

Social networking is global phenomenon that is growing rapidly. Most, if not all, of us in the training business plan to leverage this technology for a social learning solution that increases access to learning. Even if some us don't have plans yet, we at least have ideas we'd like to discuss and explore. This session will discuss the efforts Autodesk and Novell have made to put social learning to work in our training programs. From our experience fostering on-line learning communities, posting content in YouTube channels, and leveraging Twitter and Facebook, we'll discuss ways to connect learners with each other, with experts, and with content so that learning remains the social activity it's always been.

---

### Shaving Money from your Training Budget With Offshore e-Learning Development

*Barbara O'Brien*

Wonder how you can keep your e-learning development costs in check? Ever consider outsourcing to, for example, India, but were afraid to try? In this session, we'll discuss the benefits of offshoring your e-learning development to India. We'll look at what factors to evaluate when choosing a vendor, what you can expect to pay for e-learning development, what the "average" team makeup will be offshore, what pieces you should consider offshoring and what you should probably keep locally, and more.

---

### Managing a Team of Geographically Dispersed SMEs

*Darrell Walker*

Subject matter experts (SMEs) are a crucial part of any instructional design or human performance improvement project from inception to deployment. They play such a pivotal role in the success of the project and thereby in the success of the organization as it tries to elevate its performance. Without proper management, it is impossible to keep design and development projects on schedule and on budget when the SMEs are not as available as we would like. The big challenge is that the SME has a "day job." So how does one manage the learning development while maintaining a balance with the SMEs "day job," especially when the SME might be in another country, time zone, and culture?

At the Spring 2010 CEdMA Conference, Darrell shared with us the challenges his curriculum development teams were facing in synchronizing the efforts of internal SMEs, third party vendor instructional design firms, and his own curriculum teams to develop and release technical software training in conjunction with the company's security product release cycles. He shared how his teams were able to work with internal resources, third party vendors, and SMEs to overcome the challenge from a process perspective. This interactive presentation will not only update you on the continuing progress and preliminary results of this strategy, but will also introduce the different considerations you will likely need to accommodate when working with SMEs in different countries, time zones and cultures.

---

### Designing Optimal Curricula to Meet Business Goals

*Spencer Cutting*

How do you decide what training to develop and localize for a particular product? How do you modify your global curricula based on metrics and feedback? Providing a quantifiable return on investment is a key business driver for most learning organizations. This presentation focuses on how PTC is addressing these and other issues in a profit and loss business model. PTC's training portfolio model, development and localization strategy, and decision making processes will be discussed.

---

---

### Classes to Adoption Offerings - Growing the Education Pie

**Kevin Hanegan**

Are you looking to add new delivery options to your training portfolio or how to profile students in order to determine which options are best for them? Learn how TIBCO Software uses both formal and informal training components to increase both revenue and user adoption. The discussion will include an overview of the full range of formal delivery options, including instructor-led, blended training, and eLearning. We will also discuss informal learning models used like user communities, and how they can aid in user adoption as well as increase training revenue. Learn the pros and cons of each delivery model, and also understand how to profile your students and suggest the right learning format(s) for them.

---

### Training Course Prerequisites – Require Them or Waive Them?

**Beth Naczkowski**

You have carefully designed an advanced level course and set the prerequisites for the course. Then, you get a call or receive an email that goes something like this: “My customer has years of experience on Product X and doesn’t need to take the beginning class”. What do you do in this situation? When do you enforce a prerequisite and do you even consider waiving it? Beth will discuss her experience with this situation and facilitate a discussion about how other CEDMA members have addressed this issue.

---

### Good, Fast and Cheap – Choose All Three with Video-based Training

**Jim Fuller**

How do you train a few thousand engineers located in seven engineering centers across the globe on content that changes monthly with no instructors and subject matter experts that can spare less than half a day? NetApp found the right answer using video-based training. During this session, we’ll examine the scenario, the solution that was developed, and the results obtained. The NetApp team discovered several keys to success in ensuring the successful adoption of a solution that the learners did not want, but needed. Usage of the training is up by 274% since the beginning of the year. Can the success be replicated in your organization?

---

### An Education Six-Pack: Tips for Creating and Implementing Training Packages

**Natasa Koledin**

During this session, you will learn helpful techniques for creating and implementing training packages for your offerings. There are six key areas that will be discussed:

- Packaging options – How to combine your offerings based on size, audience, usage
  - Legal/Finance team discussions – How to ensure the support and processes you need from other groups is in place
  - System improvements – How to make it easier for Sales and customers to sell/purchase the packages
  - Sales incentives – How to positively impact the wallets of those responsible for selling Education
  - Collateral – What marketing materials are in place to help position and inform your audience of your packages
  - Building awareness – Tips on how to launch your Education packages internally and externally
- 

### Impactful Measurement Of Your Business with Metrics Dashboards

**Eric Kelleher & Lynn Marie Viduya**

In this session two highly experienced education leaders will discuss how they gather and publish the metrics needed to provide their management with information on key business results. You will see the dashboard examples they use to provide relevant data, analysis, and insight that both support relevant decision making and drive education’s business influence in their companies.

---

---

### Defending your Educational IP: 5 steps to ensure “The Price is Right?”

*Joe Cannata with Peter Broderick, Harvey Shaw, Sarah Sedgman & Dirk Braune*

Probably all Education teams face almost daily these situations, where you receive internal or external requests to share training softcopies or allow partner or other teams to deliver training. This session, facilitated through a panel discussion, will examine the issues surrounding the cannibalization and protection of Education IP in an organization, including legal, technical and organizational implications. The panel will discuss 5 tips to prevent Education IP from losing its value and getting the price right, which will be provided as guide after conference to CEDMA members.

---

### Comparing Approaches to Certification Testing

*Liz Burns, Joe Cannata & Beverly Van de Velde*

This session will examine the various methods in which certification testing can be performed. Through presentation and interactive discussion, we will look at present-day methodologies for testing, as well as explore some of the innovative approaches being used to secure and deliver certifications. Using our experiences, as well as input from the attendees, we will highlight forms of testing that achieve new ways to measure skill sets, and weigh some of the issues associated with all methods of certifying.

---

### The Value of a Buck

*Tom Clancy*

The challenge remains. Our customers, business unit leaders, want to know what value they are receiving in return for their investments in training. Anecdotal or traditional training metrics only go so far, and are often irrelevant in our customers' eyes. Qualitative responses to their inquiries are good, but still not what they are demanding in today's environment. They want to know that if they invest a buck in training, they are getting 'x' dollars back. They want a compelling answer to their question. And if training leaders cannot quantifiable reply with a compelling answer, our customers will probably invest the dollars in other areas. Who would blame them for doing just that, taking our training dollars away from us.

This presentation uses real examples of EMC's approach to having compelling value-based training discussions with customers at all levels of management.

---

## BIOGRAPHIES

---

### Using Social Media in Learning

#### ***Norman Buckberry***

Norman is currently responsible for the development of the global Authorized Training Center (ATC) partner program. ATC is Autodesk's premier program for supporting and promoting partners to deliver technical and business process training to users of its software. Norman is responsible for the guiding the development of the program, the tools to support the partners and ensuring it meet the needs of Autodesk and its customers worldwide. Norman has been with Autodesk for 3 years, with a previous period of 6 years with Autodesk between 1996 and 2002. Norman was previously responsible for the execution of all customer learning programs in EMEA, and for a while in the Americas. Norman has also held similar positions with Novell and Reynolds & Reynolds, as well as spending time consulting on distance learning programs and technologies. Norman started out with IBM as a Systems Engineer working on mainframe and data communications systems. Norman has been a member of CEdMA Europe since its inception, and has held various positions on its Board during those years.

#### ***David Coughanour***

David is the course and test development manager for Novell Technical Training and has been with Novell for 12 years. He started as a course developer in 1998 right after completing his MS in Instructional Technology at Utah State University. His course development team develops, edits, and publishes courseware for both classroom-based and elearning delivery. His testing team manages test item development, test publishing, certification program management, and a testing partner channel for delivering performance-based tests. David is currently leading the transition of Novell training from its traditional classroom-based focus to an approach that relies on eLearning and social media.

---

### Shaving Money from your Training Budget With Offshore e-Learning Development

#### ***Barbara O'Brien***

Barbara was most recently Director of Learning Solutions for Iron Mountain, Boston, MA. Barbara is a seasoned veteran in the field of global Customer, Employee, and Partner Education having managed course development and training delivery at software companies including Oracle, SAP, PTC, and Sterling Commerce. At Gartner Learning, Barbara was directly responsible for vetting, establishing and managing relationships with offshore vendors to build 200+ multiple-language e-learning IT products/year. At Sterling Commerce, Barbara built an L&D staff in Sterling's Bangalore office and moved development of all ILT and e-learning to that location, and built training delivery capabilities in Bangalore. She holds a Bachelor of Science from Salem State College, and has 30 SH completed towards her Master of Education at Northeastern University, Boston MA.

---

### Managing a Team of Geographically Dispersed SMEs

#### ***Darrell Walker***

Darrell Walker is Vice President, Global Education, for CA Technologies, Inc., and has more than 20 years experience in the education content development and management field. He is responsible for education content design and development in all modalities for all audience groups, and competency testing at CA Technologies.

Darrell uses a combination of internal and offshore-outsource resources to design and develop custom, standard, product, and non-product education content for CA Technologies employees, customers, and partners. In this type of business model, the success of relationship- and consensus-building is critical because of the strong dependencies required when developing courseware across multiple stakeholder communities. During his four year tenure at CA, Darrell has successfully released over 700 courses in all modalities, including virtual, elearning, and traditional ILT. This has enabled CA Education to deliver training to more than 40,000 students since 2007.

Prior to CA, Darrell served twelve years in the US Navy nuclear submarine force as an electronics technician. He spent the last five years of that service as a Master Training Specialist at the Naval Submarine Training Center Pearl Harbor.

Following his tours of duty he led the technical curriculum development, field service engineer training, and certification programs for Analysis & Technology, Cymer, and Siebel Systems.

---

### Designing Optimal Curricula to Meet Business Goals

#### **Spencer Cutting**

Spencer Cutting, Vice President, Curriculum Development at PTC, is responsible for the development of customer training for all PTC product lines, including computer aided design, product lifecycle management and dynamic document authoring products. After joining PTC nearly 16 years ago, Spencer held consultant and consulting manager positions for two PTC product lines before being asked to apply his field experience to customer training. Since then, he has been responsible for expanding the Web-based training program to account for over 40% of the annual education revenue, while implementing new tools and methods to control development expenses. Spencer was born and raised in Cambridge, UK and holds an Engineering degree from Coventry University. He now resides in Oconomowoc, Wisconsin with his wife and two children.

---

### Classes to Adoption Offerings - Growing the Education Pie

#### **Kevin Hanegan**

Kevin Hanegan is a Director of Educational Services for TIBCO Software. Kevin is currently responsible for course development and delivery for the Spotfire product, which is part of TIBCO Software. To complement the product, the training program has been designed to bring to market a wide range of training delivery options to meet its customers learning needs, ranging from classroom, eLearning, custom, blended and a variety of other informal learning components. Kevin has also been an instructor and course developer for a variety of Universities, including University of California Irvine, Northeastern University, and the National Technology University, focusing on web design and development courses taught using various distance learning methods. Kevin is also an accomplished technical writer and the author of 4 computer books: Building State-of-the-Art Web Pages, Custom CGI Scripting with Perl, Practical Guide to Curl, and Building Solutions with the DecisionSite Analytics Platform.

---

### Training Course Prerequisites – Require Them or Waive Them?

#### **Beth Naczkowski**

Beth Naczkowski has worked in training and support for software/hardware companies for 22 years. She is currently World Wide Customer Education Director at F5 Networks. The companies she has worked for have run the gamut from medical lab software to internet traffic management software and hardware. She has been an instructional designer, technical trainer and training manager as well as a technical support manager and implementation consultant. She has an Environmental Planning degree from UC Santa Cruz and an MBA from Seattle University.

---

### Good, Fast and Cheap – Choose All Three with Video-based Training

#### **Jim Fuller**

Jim Fuller is the Sr. Director of Education Product Development at NetApp. His organization is responsible for the development of customer, partner, field and engineering training courses on NetApp products and technologies. His team is located across the globe at NetApp's various engineering centers.

Jim began his career by joining Hewlett-Packard as an electrical engineer. During his 18 years at HP, he worked in manufacturing, R&D, engineering, sales, support and HR, and was responsible for the leading the professional development of HP's world-wide education function as well as HP's research center in alternative learning technologies. Along the way, Jim earned a graduate degree in instructional technology and a doctorate in educational psychology.

After HP, Jim ran a very successful consulting business assisting organizations such as Procter & Gamble, Oracle, Intel, National Semiconductor, Levi Strauss, and the US Navy to improve the effectiveness of their performance improvement organizations.

Jim has authored Managing Performance Improvement Projects and From Training to Performance Improvement as well as contributing chapters to several books in the learning / performance field.

---

---

## An Education Six-Pack: Tips for Creating and Implementing Training Packages

### ***Natasa Koledin***

For almost 4 years, Natasa Koledin is Vice President Worldwide Education at Endeca Technologies where she is responsible for customer, partner, and employee enablement. Her career spans 15 years in the Training industry (including Business Objects, Silvon Software) with emphasis on building/scaling education businesses, user adoption techniques, and custom education methodologies spanning global markets. Natasa is also a member of the CEDMA Executive Council and a recent recipient of the Top Young Training Professionals Award as issued by Training Magazine.

---

## Impactful Measurement Of Your Business with Metrics Dashboards

### ***Eric Kelleher***

Eric Kelleher is the Vice President, Products & Training for the Customers for Life organization at salesforce.com. In this role, he is responsible for bringing great success-enabling professional services, training, and support products to market. In addition, for the past 4 years Eric has led the worldwide training & certification team, including course and exam development and training delivery. During his tenure at salesforce.com training has grown revenues by 500%, expanded its reach, and built a worldwide community of salesforce.com certified professionals. Eric began his 16 year career in software engineering and he has spent the last 10 years in Software as a Service leadership roles spanning sales engineering, professional services, training & certification, and product management.

### ***Lynn Marie Viduya***

Lynn Marie Viduya started her training career while working abroad building programs and new business opportunities for a language school. She pioneered the creation and use of diagnostic tools to customize training for specific business clients. Upon her return to the U.S., she worked for a San Francisco software start up and developed award-winning staff development programs with internal certification. From there, she moved to Siebel Systems and conceptualized /managed two of the top three flagship training courses and also managed the media-based training team. She was awarded Siebel's CEO Circle Award for distinguished job performance and demonstrated leadership.

Presently, she is a Director of Global Education Services at NetSuite, Inc. headquartered in San Mateo, California. Her team has won management awards for building a robust self-paced training library and technical curriculum. She built NetSuite's curriculum development function from the ground up, expanding its customer and partner course offering ten-fold and more than doubling training revenue in less than 3 years. She also manages the Virtual Classroom program which represents about 90% of NetSuite's courseware sales.

---

## Defending your Educational IP: 5 steps to ensure "The Price is Right?"

### ***Joe Cannata (Moderator)***

Joe Cannata is the Atlanta-based Certification Manager at Brocade. He started with Brocade over 10 years ago, and was one of the first 5 employees in their fledgling Education Department. He was hired to teach classes and to inaugurate the Atlanta Education Center. Joe then took on the task of giving life to the certification program in mid-2000. His role changed to exclusively running the program in 2007, and helped the program gain industry recognition.

### ***Dirk Braune (Panelist)***

Dirk Braune is Vice President Education and Partner Programs at Alcatel-Lucent Enterprise with global responsibility for Development and Programs of Enterprise Training and Certification. Since joining Genesys / Alcatel-Lucent in 2000, he has served in different functions in services including running Genesys University for 5 years. Over his 20-year career in the industry, Dirk has worked with and in international companies and teams as project manager, instructor and manager, including subsidiaries of Siemens and HypoVereinsbank/UniCredit. His executive and operational experience includes strong P&L management skills, international team development and optimization of service business processes. Dirk holds a Master in Psychology from Ludwig-Maximilians-University in Munich.

### ***Peter Broderick (Panelist)***

Peter Broderick is Vice President of Educational Services and Service Business Development. Peter's current responsibilities include managing the Education P&L and the internal training organization. Peter also manages business development for the Professional Services organization. With over 25 years of experience in various sectors of the high tech industry, Peter has developed and managed the following functions - Project Management Office (PMO), Service Business Development, Service Marketing, Service Readiness and Education development and delivery.

Prior to joining Kronos in 1999, Peter held senior level Service positions at PictureTel Corporation, Digital Equipment Corporation and Honeywell Corporation. He earned a BS in Business Administration from Merrimack College and a Masters in Business Development from Lesley University.

### ***Sarah Sedgman (Panelist)***

Sarah Sedgman is the Senior Manager, WW Customer Education & Operations, Business Analytics at IBM. With over 12 years experience in Global Customer Technical Education, Sarah has held various roles as a technical writer, instructional designer, manager and leader. In her leadership, she has driven efficient process and best in class courseware for IBM Cognos software, contributing to a large Education business, with her Offering Management, Course Development, Quality Assurance/Production, eLearning, Education Translation and Global Operations teams. In 2008, Sarah executed on a faster time-to-market initiative to release courses within 30 days of product availability. In 2009 she launched an Instructor-led Online Program that pulled significant revenue. In 2010, Sarah is turning her team's focus to self-paced, just in time, self-service learning opportunities for IBM customers, offering choice to the learner and delivering high-value training with no travel required.

### ***Harvey Shaw (Panelist)***

Harvey Shaw is the Manager of Remote Learning for the Global Education group at Brocade. He has been in technical training for 16 years, the last 9 with Brocade. Harvey has worked as an instructor, course developer, and curriculum designer before moving in 2007 to developing and delivering remotely-delivered training, particularly self-paced, web-based training.

---

## **Comparing Approaches to Certification Testing**

### ***Liz Burns***

Liz Burns has 15 years experience enhancing personnel performance through development, implementation and management of innovative professional certification programs, worked in all areas of exam development and certification program management. Liz has made significant contributions to the certification programs at Sybase, i2 Technologies, EMC and most recently at Juniper Networks. Constantly seeking to give back and identify innovative ways to improve certification programs, Liz is involved in several industry initiatives including the CEDMA Certification SIG and ATP Security Initiative. Liz implemented an innovative and comprehensive exam security program at EMC that reduced incidents of exam fraud as well as the impact of perceived exam security issues on the EMC Proven Professional Program. She was also instrumental in developing and delivering the recent CEDMA sponsored survey on Certification "Best of Program" within the IT industry.

### ***Joe Cannata***

Joe Cannata is the Atlanta-based Certification Manager at Brocade. He started with Brocade over 10 years ago, and was one of the first 5 employees in their fledgling Education Department. He was hired to teach classes and to inaugurate the Atlanta Education Center. Joe then took on the task of giving life to the certification program in mid-2000. His role changed to exclusively running the program in 2007, and helped the program gain industry recognition.

### ***Beverly Van de Velde***

Beverly currently manages the Symantec technical certification and accreditation programs for all global end users. She has spent most of her career in the IT industry, has over 10 years in project management with P&L oversight, as well as over 3 years in high stakes technical certification management. Prior to joining Symantec, Beverly managed the IT certification program, a curriculum development program & team, and an offshore team in India who conducted

performance-oriented learning services including analysis, design, development, implementation, and evaluation of IT and soft skill training solutions for Countrywide. Beverly is best known for starting a business from scratch or revamping a struggling business or process for efficiency and scalability.

---

### **The Value of a Buck**

#### ***Tom Clancy***

Tom Clancy is Vice President of Education Services for EMC Corporation. At EMC, Tom has held various field and global corporate roles in Marketing, Sales, Services, and Manufacturing, primarily in entrepreneurial initiatives and major account management.

Prior to Education Services, Tom managed Global Sales Productivity, focusing on field development, best practices and change execution. Tom's team has transformed Education Services from vendors to trusted consultants. This has yielded dramatic results for EMC employees, partners, customers, and university partners with programs such as; EMC Proven Professional, Sales & Partner Accreditation, Education Services Business Intelligence, and the EMC Academic Alliance.

Tom's mission is to enable readiness, grow mindshare, brand, and loyalty, and create competitive advantage for his customers as individuals and as entities.

Tom earned his B.S in Business Administration from the University of Massachusetts and his MBA from Suffolk University.

---