



Investment Management Consultants Association

Edythe McClatchy Pahl, Executive Director

Goals

Enhance self-study program to create a more engaging learning experience

Create scalable programs with flexible delivery models

Provide opportunities for member-customized programs

Challenges

Present learning content owned by a third party

Low participation levels due to passive learning model (conference calls)

Solution

Blended learning approach incorporating Pearson design, curriculum, and development expertise; and XPERT eCampus community and support technology

Results

Self-owned program and content

Increased learner participation and completion rates

Flexible teaching and learning models, including self-paced rolling admissions, and group-focused delivery

Investment Management Consultants Association (IMCA) provides investment management consulting professionals with the investment consulting and wealth management credentials and educational tools they need to best serve today's clients. Through rigorous adherence to knowledge assessment and quality assurance, IMCA sets the bar for standards and practices in the investment management consulting profession.

One of IMCA's defining features is the organization's commitment to improving the membership's educational base. To reflect a focus on only the best and the brightest in the field, IMCA's designations are offered only through the top business schools in the United States. When IMCA was seeking a partner to further its educational reach, expand its content delivery, and streamline its own financial efficacy, it wanted an organization with the kind of quality standards and industry leadership that mirrored its own.

"Pearson Learning Solutions is heads and shoulders above the rest," says IMCA's executive director, Edythe McClatchy Pahl. "No other provider comes close to Pearson's extensive content and technical knowledge or its ability to pull from such a wide range of leading-edge in-house and external resources, including textbooks, media components, and even subject-matter experts."

IMCA's partnership with Pearson Learning Solutions began in October 2007. Using the eCampus interactive learning platform as a base, Sean Stowers, a Pearson Learning Solutions consultant, presented IMCA with a scalable, high-end vision of blended learning that incorporated the kind of interactive features proven to streamline and expedite the learning process. Stowers outlined solutions for the organization's Essentials of Investments program.

"We jumped on Sean's recommendations full force," says Pahl. "In response, he pulled together the most professional project team I've had the pleasure to work with. From attention to detail and access to resources, to problem solving—I can't say enough about them."

The Pearson Learning Solutions team provided IMCA with comprehensive instructional design and content development, which included analysis of IMCA's course and designation programs, creation of discussion questions and knowledge application questions that aligned with IMCA's existing assessment bank, and development of reading and lecture-based ancillary components. But Pearson Learning Solutions support doesn't end when the project team goes home. Pearson provides 24-hour turnaround technical support and a help desk discussion board.

Both IMCA and its members are pleased with the organization's new delivery formats. "The difference is like night and day," says Pahl. "Our courses used to be delivered via conference call, and they were passive, static. Today, discussion boards, online quizzes, slides, and audio lectures offer our audience the flexibility to choose when, where, and how they learn best. Members interact with each other and with subject-matter experts, placing the content in a real-world context and enabling a deeper level of understanding."

IMCA's new online learning format provides the organization with another important benefit: standards control. "As a certification organization, we're primarily about standards," says Sean Walters, deputy executive director at IMCA. "This new solution enables us to enter any client company, customize to its unique audience's stage of development, and remain true to our standards and those of the industry."

"It's all just a first step," says Pahl. "We look forward to fine-tuning this success over the next few years and continuing our relationship with Pearson."