

# Egypt Training Market Overview



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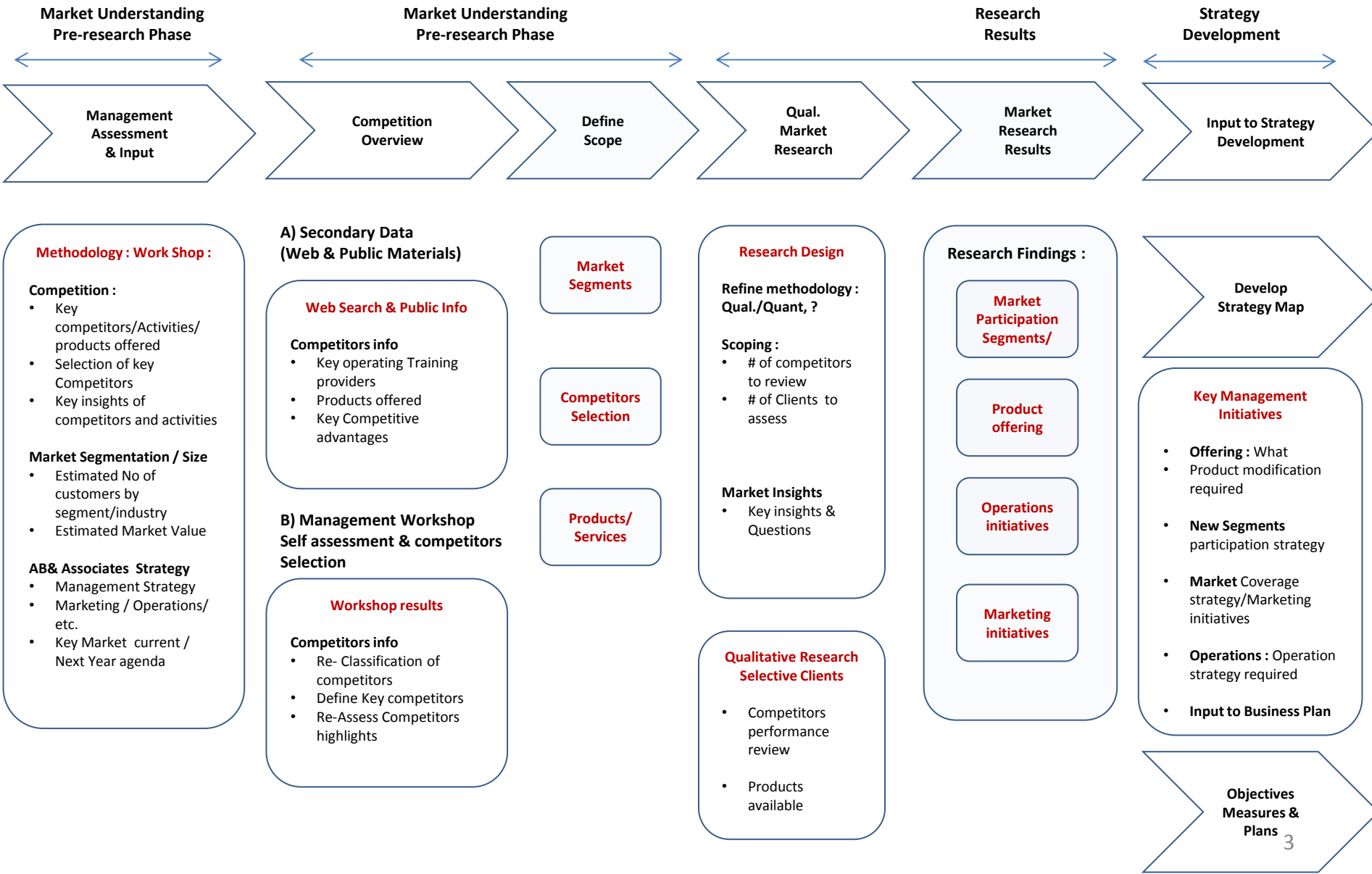
# Egypt Training Market Overview

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# Research Methodology



## Table of Contents :

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- Overview - Methodology – Outcome
- Competitive Landscape / Size
- Market Segmentation
- Client profiling & Needs
- Competitive Assessment

# Competitive Landscape Overview

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## **Main objectives :**

- Defining what are key competitors.
- What Areas of strength and weakness

## **Methodology :**

- (A)Management workshop (defining competitors )
- (B) Website search (product offered )
- (C) Competitive intelligence (competitors interviews / customers feedback)
- (D) qualitative research (for key clients) TBA

## **Outcome of this assessment :**

- Better understanding of what competitors are positioned / offer
- Internal training of what competitors are offering
- Revisiting corporate strategy /Shaping our key agenda for the coming year(s)

## **Note :**

- Maybe full/part of this info would be available might not be required to be researched , however would be good to be documented for communication purposes across the organization (internal training or induction purposes)
- Some insights on the industry could be good to be surfaced and communicated for the interest of defining /

# Competitive Landscape

## Players / Ranking (competition Who is Who)

### Objective :

- Define/Scope - key competitors
- Key competitors for same segment (customer profile)
- Key competitive advantage for AB versus Competitors

### Methodology :

- (A) Management assessment
- (B) Market Survey
- (C) Web Search
- (D) Customer Research (TOM awareness ) for selected Key Clients
- Selection Criteria and Management assessment
- Overview and self evaluation and suggestion

	Competitors Class (A)	Competitors Class (B)	Competitors Class (C)
Profile	<ul style="list-style-type: none"> <li>- Multinational focus</li> <li>- Large Local Corporates</li> <li>- Offers Managerial development products</li> <li>- Properly branded</li> <li>- Affiliation with international brands etc.</li> </ul>	<ul style="list-style-type: none"> <li>- small Enterprises</li> </ul>	<ul style="list-style-type: none"> <li>- Xxx</li> <li>- Xxx</li> <li>- Xxx</li> <li>- Xxx</li> <li>- Xxx</li> </ul>
Players	Examples : Logic/IMI/ etc.. <ul style="list-style-type: none"> <li>- B</li> <li>- C</li> </ul>	<ul style="list-style-type: none"> <li>- D</li> <li>- E</li> <li>- F</li> </ul>	<ul style="list-style-type: none"> <li>- G</li> <li>- H</li> <li>- I</li> </ul>
Criteria A			
Criteria B			

Classification would be agreed upon prior to assessment

### Outcome :

- **Strategy development** : Competitors customer perception
- **Product Identification & Development** : Define product offered by competitors Segments
- Self positioning – (Ranking)
- Customer profiling
- Initial overview of market segments

# Competitive Assessment

## Key competitors Benchmarking :

### Objective :

- Evaluation Training competitors in terms of :
  - Product offering / Market perception / Customer Feed-back “Quality” .. etc.

### Methodology:

- (A) Management Input
- (B) Qualitative Research (Selective)

	Research Methodology		Competitor A	Competitor A	AB & Associates
	(A)	(B)			
Product offering (+/-)	X				
Marketing Strategy (+/-)	X				
Delivery & Feed-back (+ / -)		X	• Qualitative research (selective key clients)		
Customer TOM awareness		X	• Top 3 training providers ( Branding & Marketing )		
Customer perception		X			
Overall (+ / -)		X			
Key insights		X	Other Research findings		

Key Competitors  
TBD

Assessment Criteria to be defined

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# Market Segmentation

## Customer Segmentation : Customer Profiling

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### Objective :

- Define/Scope key competitors
- Key competitors for same segment (customer profile)
- Key competitive advantage for AB versus Competitors

### Methodology :

- (A) Secondary data overview (web & Materials)
- (B) Management assessment
- (C) Qualitative Research (Selected clients)

#### Define (Refine) Market Segment

#### Competitive assessment Against Market Segments

#### Segments include / Exclude

#### Develop Segment Participation Strategy

- Define / refine current / potential market segments
- Overview of Market segments
- Identify New Segments

- Define key players across segments
- Define competitors in each segments
- Define products offered versus each segment
- Highlights on competitors performance / by Segments
- Define Services/ products offered by segment

- Define / refine segments
- Define Segment Attractiveness

- Develop participation strategy
- Segment / Products

### Outcome :

- Identification of the segments and estimated size and eventually estimated market Value
- Is this segment attractive enough ? Readiness to this segment ?
- **Product Portfolio** : What portfolio for each segment
- What is our market strategy to participate in this segment ?

# Market Segmentation

## Customer Segmentation : Customer Profiling

### Objectives :

- **Market Segment Definition** : Industry / Size / etc.
- **Identify Competitive position** : AB& Associates Versus key competitors
- **Defining Key development areas** : Product offered

	Segment A Example : Multinationals & Large Locals	Segment B "Small & Medium"	Segment C Governmental Section
Segment Definition			
Attractiveness			
Segment Needs			
Key Product offered			
Competitors	A/B/C ...		
<b>AB Participation</b>			

"Example Segments" Segmentation to be agreed Upon Prior to Assessment

### Outcome :

- Identification of the segments and estimated size and eventually estimated market Value
- Is this segment attractive enough ? Readiness to this segment ?
- **Product Portfolio** : What portfolio for each segment
- What is our market strategy to participate in this segment ?

# Market Segmentation

## Customer Segmentation / Competitors Participation

### Objective :

- **Competitors / Segment Assessment** : Defining key segment currently participating /not participating & the winning model
- **Define AB & Associate's Ability to Win** : Define Segment attractiveness and our Ability to what strategy needed to participate in this segment
- **Segment Attractiveness:** Define is segment f attractive / profitability / Potential /

	Segment A Example : MNC's & Large Locals	Segment B "Small & Medium"	Segment C Governmental Section
AB & Associates (+)			
(-)			
Competitor A (+)			
(-)			
Competitor A (+)			
(-)			
Competitor A (+)			
(-)			

### Outcome :

- Competitor's assessment versus segments

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- Competitive Assessment
- Market Research (clients)

# Customer Behaviour

## Marketing activities effectiveness / Customer needs / Selection process

### Objective :

- **Market Needs** : Proper understanding of client behaviour / Market needs
- **Marketing** : Key effective marketing activities
- **Vendor Selection process** : and key influence in vendor selection
- **Key products** : Understand of current products offered
- **Feed-back & Evaluation** : Key feed-back on services providers performance in key development areas

### Methodology :

- **Scope** : Around 20-50 Clients / Various Segments
- Selective clients across various sectors
- Our clients / competitors clients

### Management Need For Training

#### Objective:

- Understand client objectives
- Estimated size / Segment (TBD)

#### Outcome :

- Market growth understand how client thinks –
- How training is perceived and training value

- Selective Clients Qualitative research

### Customers Awareness Of providers & Products

#### Objective :

- Rationalize Marketing / Spending
- Product Optimization

#### Outcome:

- How would the client shop for providers
- What is the key influence for provider selection

### Customer's Training provider Selection Process

#### Objective :

- Identify Key influence in providers selection process
- Market position with relevance to provider selection

#### Outcome:

- **Strategy Optimization** :
- key influence in selection process

### Customer's Training Experience

#### Objective :

- Review of Customers' perception of training provided by AB versus others
- Identify any development areas

#### Outcome:

- Customer feed-back on services delivered
- Scope : our clients and competitors clients

# Market Research

## A- Technical Offer

### A- Local Training providers Research

- Deliverables
- Client's Survey form
- Scope of Research

### B- International Training Providers

- Objectives, Methodology & Deliverables
- Scope of Research
- Sample of Deliverables

## B. Financial Offer

# Research

## A- Local Training providers Research –Deliverables

### Deliverables :

<b>Sectors :</b>	Industrial – FMCG – (TBD)				
	<ul style="list-style-type: none"> <li>Will Agree on Agreed Sectors of interest of AB &amp; Associates</li> </ul>				
<b>Scope of Research (Products) :</b>	<table> <tr> <td><b>Training</b></td> <td><b>Assessment Centres</b></td> </tr> <tr> <td> <ul style="list-style-type: none"> <li>Management Tracks</li> <li>Leadership</li> </ul> </td> <td></td> </tr> </table>	<b>Training</b>	<b>Assessment Centres</b>	<ul style="list-style-type: none"> <li>Management Tracks</li> <li>Leadership</li> </ul>	
<b>Training</b>	<b>Assessment Centres</b>				
<ul style="list-style-type: none"> <li>Management Tracks</li> <li>Leadership</li> </ul>					
<b>Expected No of Interviewed clients</b>	50 ( Across AB & Associates & Competitors Clients]) <ul style="list-style-type: none"> <li>Level of Interviewed clients to be Managers/ Directors / Training Managers</li> <li>Based on Sectors Agreed earlier</li> </ul>				
<b>Survey Method :</b>	<ul style="list-style-type: none"> <li>Interview - One on One interview</li> <li>Interview Method : Client Visit – Over Phone interview</li> </ul>				
<b>Implementation Period :</b>	8 – 10 Weeks				

### 1. Market Survey Results :

1. Training Activities & providers	2. Assessment of Training Providers	3. Knowledge of Assessment Centre	4. Knowledge of AB & Associates
Key Insights	Key Insights	Key insights	Key insights
<ul style="list-style-type: none"> <li>Top of Mind Awareness of Training providers</li> <li>Key Marketing Activities Impacting training providers selection</li> </ul>	<ul style="list-style-type: none"> <li>Key training delivered</li> <li>Ranking of Training providers in-terms of the following :               <ul style="list-style-type: none"> <li>Quality of Training provided</li> <li>Client's Ranking of providers</li> </ul> </li> <li>Over all rating of provider</li> </ul>	<ul style="list-style-type: none"> <li>Clients' awareness of the concept</li> <li>Key priorities of assessment centres</li> <li>Over all experience with other competing companies</li> <li>Client need to Learn about assessment Centre concept</li> </ul>	<ul style="list-style-type: none"> <li>AB &amp; Associates Reach</li> <li>Effectiveness of Marketing Activities</li> </ul>

Comments : Survey key Questions would be revised and agreed prior to service delivery

# Training Providers Egypt

## A- Local Training providers Research - Client's Survey form

### Survey Form

#### Corporate info

Client Name

Segment :

#### 2. Staff & Management :

Head Count :	White Collar	Blue Collar
Training Budget allocation	%	%
HR Function (Count)		
HR Manager		
Training Manager		

#### 1. Training Activities & providers

Average Annual No of Training Activities			
Key Training providers	1	2	3
How did you know about Training providers			
What influence Provider selection	Seminars	Activity	Xxx (TBA)
How do you Rank your current provider	Very Good	Good	Average

#### Assessment of Training Providers

	Provider A	Provider B	Provider C
Key products offered			
No of Activities Annual			
Overall Rating	Outstanding/Good/Average/Poor	Outstanding/Good/Average/Poor	Outstanding/Good/Average/Poor
Ranking	1/2/3	1/2/3	1/2/3

#### What training content did managers rate as important stations?

- Development - Membership & Underwriting
- Increasing Audience size and Loyalty
- Management Development
- Personal skills [i.e. Stress management, interpersonal communication]
- Software training
- Improving Reporting, writing, & editing
- Improving the quality of production

#### Assessment Centre

Are you acquainted to the service	Yes	No	
<i>(if Above Answer is No)</i> Do you have intention to Learn about this service :?	Yes	No	
Conducted Assessment Before	Yes	No	
<i>(if above Answer is Yes)</i> Service Provider for The Assessment			
Scope of assessment	Management	Employment	
Over all Expectation	Above Expectation	Average	Below Expectation
Value for Service Delivered	Above Expectation	Average	Below Expectation

#### Knowledge of AB & Associates

Have you heard about AB & Associates	Yes	No	
<i>(If Above question answer yes)</i> When were you last contacted by AB & Associates	3 Month	6 Months	More Than 6 Months
Your Feed-back on AB & Associates	Above Expectation	Average	Below Expectation
Any Development Areas			

#### Your Organization's Key Training priorities

- Soft Skills
- Project Management
- Supply Chain Management
- Sales & Marketing
- Leadership & Management
- Quality Management



# Training Providers Egypt

## A- Local Training providers Research – Scope of Research



Dale Carnegie



LTC



Logic



Quest



Scitron



Knowledge Academy



Edge Consultants



Aspire



Brilliance



SETTEC

EBI



Insight



Skills Worldwide



IMI-Int'l company for HR



AUC



FTTC



Career Gates



ZAD GROUP:



Top Business



ITS



AFB Consulting



Developers for training & consultancy



INTEC –Int'l Experts & Consultants Association



Premiere training company

# Training Providers Egypt

## A- Local Training providers Research – Sample of Deliverables

	Skills worldwide	IMI
<b>Regional presence</b>	Cairo:, Alexandria:, Dubai: UAE, Khartoum:, Riyadh , KSA	implemented several training programs in the Middle East, specifically in Algeria, Dubai, Qatar, Syria and Yemen
<b>Notes</b>		<ul style="list-style-type: none"><li>Owned by Mansour &amp; Maghrabi</li></ul>
<b>Offer</b>	<ul style="list-style-type: none"><li>Ready Made Training</li><li>Custom Made Training</li><li>Training Needs Assessment</li><li>R&amp;D Services</li><li>Content Development Centre</li><li>Innovation and Creation</li><li>E-Training</li><li>General Management Programs</li><li>Vocational Programs</li></ul>	<ul style="list-style-type: none"><li>Ready Made</li><li>Tailored</li><li>Programs : Cambridge/ILK/ICCI/PMP</li></ul>
<b>Notes</b>	<ul style="list-style-type: none"><li>franchising community</li><li>Mainly approaching R&amp;D technique</li><li>Offering E Learning</li></ul>	
<b>Strategic partner</b>		ICCI ILM Cambridge
<b>Key Segments</b>		

**SAMPLE**

# Top International Training Providers (Leadership / Sales)

## B- Methodology & Deliverables

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<b>Objectives:</b>	<ul style="list-style-type: none"><li>• Survey International training providers ranked by training industry.com</li><li>• Overview Ranked Training providers to Foresee the possibility of affiliation / collaboration</li></ul>
<b>Scope of Research (Products)</b>	Top Providers ( Ranked by Training Industry.com) 2008-2011 <ul style="list-style-type: none"><li>• Leadership Training</li><li>• Sales Training</li></ul>
<b>Expected No of Interviewed clients</b>	Around 25 Training providers - AS per Ranking 2008 – 2011
<b>Research Method</b>	<ul style="list-style-type: none"><li>• Desktop research</li><li>• Communications through Emails</li></ul>

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## Methodology



## Deliverables

- Profiles for training providers ranked by Training industry.com

- Includes Regional presence
- Key products offered
- Affiliates in the Region Middle East
- Affiliates World-Wide

- Based on Selection process and product offered that would fit AB & Associates would short list key providers
- AB& Associates to communicate and obtaining future details and any

# Top International Training Providers (Leadership / Sales)

## B - Scope



### Top 20 Sales Training Companies 2011 2010

Logo	Company Name	2011	2010	
	Achieve Global	X	X	
	AMA – CMA	X	X	
	Blessing White	X	X	
	Center for Creative Leadership	X	X	
	DDI	X	X	
	Disney Institute	X	X	
	Duke	X	X	
	E Cornell	X	X	
	Element K	X	X	
	Franklin Covey	X	X	LTC
	Harvard Business	X		
	Hemsley Fraser	X	X	
	Impact	X		

- The “Top 20” list recognizes the top sales training companies in our industry. These leading companies all provide outstanding service, and a proven track record for delivering superior sales training and improving the impact of the sales organization.
- TrainingIndustry.com frequently reviews, conducts assessments and surveys sales training companies that provide services to the corporate and government market. Intended to assist buyers of training services, The Top 20 list supplements the procurement process and the evaluation of potential training partners and vendors.
- Selection to this year's "Top 20 Sales Training Companies" was based on the following criteria: 2011 Sale top 20
  - Breadth and innovation in services and delivery methods offered
  - Industry recognition and impact on sales training industry
  - Strength of clients served
  - Geographic reach and participants trained
  - Company size and growth potential

### Top 20 Leader Ship Training Company 2011 2010

Logo	Company Name	2011	2010	
	Ken Blanchard	X	X	LTC
	Kenxa	X		
	Linkage	X		
	Vangent	X	X	
	Wilson Learning	X		
	Zenger Folkman	X		
	PDI Ninth House		X	
	QA		X	
	Forum		X	
	Linkage		X	
	Richardson		X	

- TrainingIndustry.com continuously monitors the training marketplace looking for the best providers of Leadership training services. As part of our commitment to the industry and service to our community members and website visitors, we announce Top Company Lists to help buyers of leadership training programs, products and services choose a partner that does it best.
- Selection of the Top 20 Leadership Training Companies was based on the following 2011 Leadership top 20criteria:
  - Thought leadership, assessments or research to support programs
  - Strength of clients and audiences served
  - Geographic reach and participants trained
  - Company size and growth potential
  - Industry recognition, innovation and impact

Due to the diversity of services included in leadership training programs, no attempt is made to rank the “Top 20.”

# Top International Training Providers (Leadership / Sales)

## B- Sample of Deliverables



	Disney Institute	Duke	Zenger Folkman	Hemsley Fraser	Forum	Richardson
<b>Website</b>	<a href="http://DisneyInstitute.com">DisneyInstitute.com</a>	<a href="http://Dukece.com">Dukece.com</a>	<a href="http://ZengerFolkman.com">ZengerFolkman.com</a>	<a href="http://HemsleyFraser.com">HemsleyFraser.com</a>	<a href="http://Forum.com">Forum.com</a>	<a href="http://Richardson.com">Richardson.com</a>
<b>Products</b>	Leadership Excellence People Management Quality Service Brand Loyalty Inspiring Creativity Business Excellence	<b>Custom Programs</b> Program Design <b>Advisory Services</b> Design Lab Learning Architecture Restructuring L&E Leaders as Teachers <b>Learning at Work</b> Team Based The Loom	<b>DEVELOPMENT PROGRAMS</b> The Extraordinary Leader™ The Inspiring Leader™ The Extraordinary Performer™ The Extraordinary Coach™ <b>FOLLOW-UP PROGRAMS</b> ActionPlan Mapper™ The Extraordinary Leader Follow-Up™ <b>ASSESSMENT &amp; MEASUREMENT</b> 360-Degree Assessments Organizational Employee Surveys Team Surveys Customized Surveys <b>SERVICES</b> Facilitation Facilitator Certification Independent Coaching Channel Coaching The Extraordinary Leader™ Executive Coaching UTAH USA	Management and leadership development Personal impact and effectiveness Project management PA, Secretary, Administrator Credit and finance Sales Customer service Marketing and PR Publishing and media Health & safety HR, employment law and train the trainer	Develop Your Leaders Invigorate Your Salesforce Advance Workplace Learning Deliver Your Customer Experience Accelerate Execution	Sales Performance System Readiness Development Sustainment
<b>International Presence</b>		<b>Europe</b> : London <b>Americas</b> <b>Asia</b> : India <b>Africa</b> : Johannesburg, S.Africa		UK	Forum has 14 offices around the world <b>Asia-Pacific</b> : Australia, Hong Kong, India, Japan, Korea New Zealand Singapore EMEA : United Kingdom <b>North America</b> : Canada United States	Europe, M-East, Africa HQ Asia-Pacific (APAC) Latin America HQ
<b>Selection Criteria 1</b>						
<b>Selection Criteria 2</b>						

SAMPLE