State of Learning & Development 2016: Ready to Evolve

Industry Perspective

Brandon Hall
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Brandon Hall Group Research Team
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Executive Summary

Organizations continue to struggle with developing a solid learning and development strategy that has a genuine impact on the business. This challenge leaves many companies without the guidance necessary to design, develop and deliver effective learning programs that boost not only individual performance, but organizational performance as well. In fact, 14% of companies overall say they have no L&D strategy at all. These are typically smaller companies; the rate is only 7% among companies with 10,000 employees or more and 24% for those with fewer than 1,000.

However, the simple presence of a learning strategy does not mean that all is well. Among those companies that have a strategy in place, the majority don't believe the strategy is all that effective in helping achieve business goals.

| Figure 1 | Effectiveness of Learning Strategy in Meeting Business Goals |

Not at all effective ■ Somewhat effective ■ Effective ■ Very effective
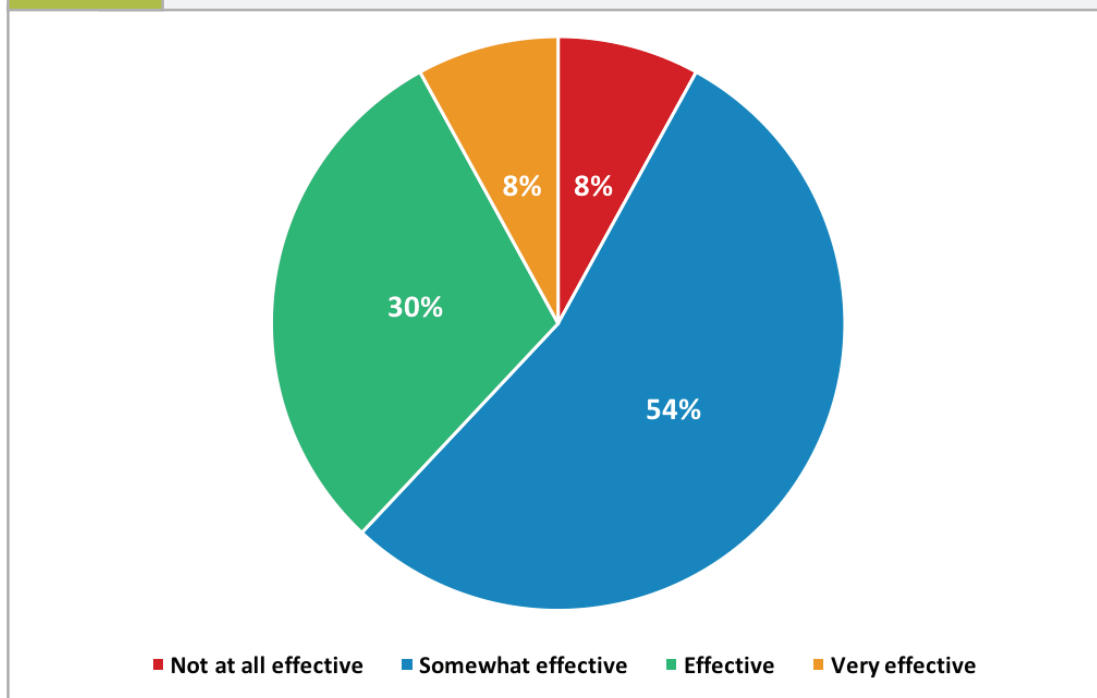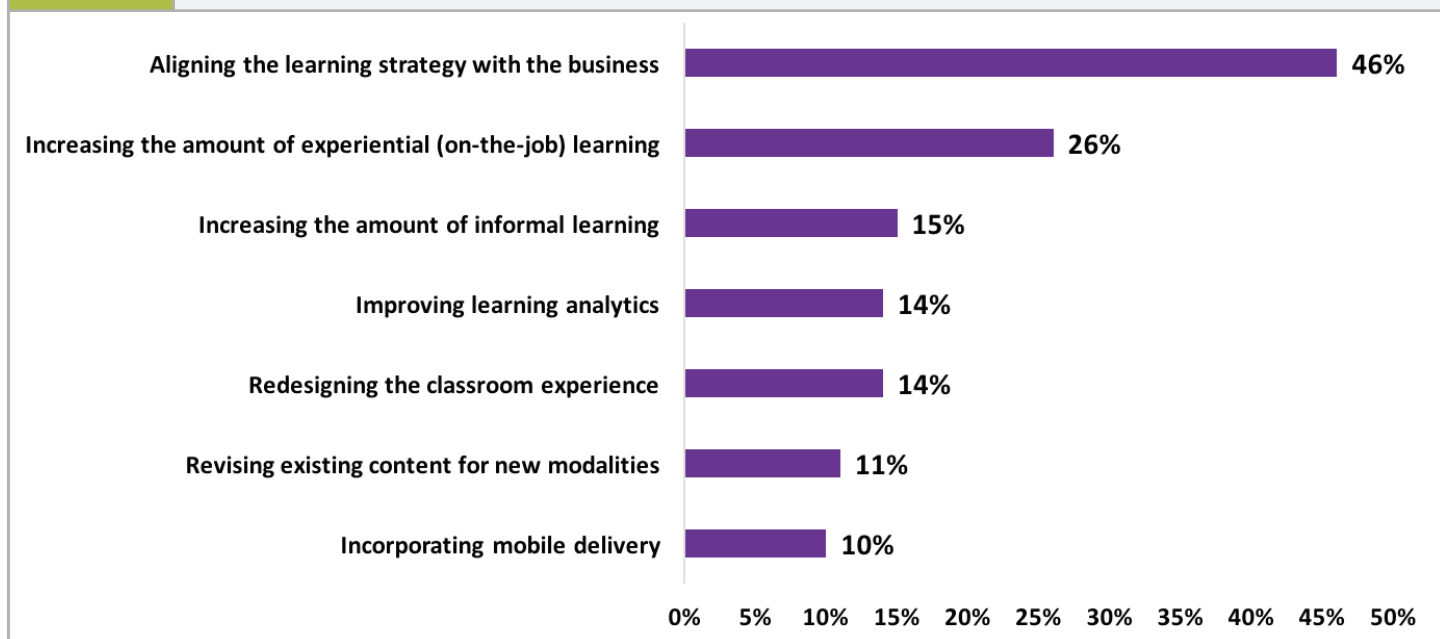
Source: 2016 Brandon Hall Group Learning Strategy Study (n=397)

Less than 8% of companies with an L&D strategy would call it very effective and less than one-third even call it just effective. This does not mean that the programs themselves are not effective in delivering learning, or that employees are not acquiring new knowledge. What it does mean, however, is that even if the execution is perfect, the strategy itself has little to no impact on the business. For these companies, a lot of the time, money and energy spent designing and delivering learning is for nothing. As organizations continue to struggle with determining the ROI for learning, this is a troubling sign.

The good news is, most of these companies recognize that they are strategically challenged when it comes to learning, and they are focused on doing something about it. The most important learning initiative is to align the learning strategy with the business. However, there are many competing priorities the learning function needs to manage in order to be successful.

| Figure 2 | Most Critical Learning Initiatives for Achieving Business Goals |

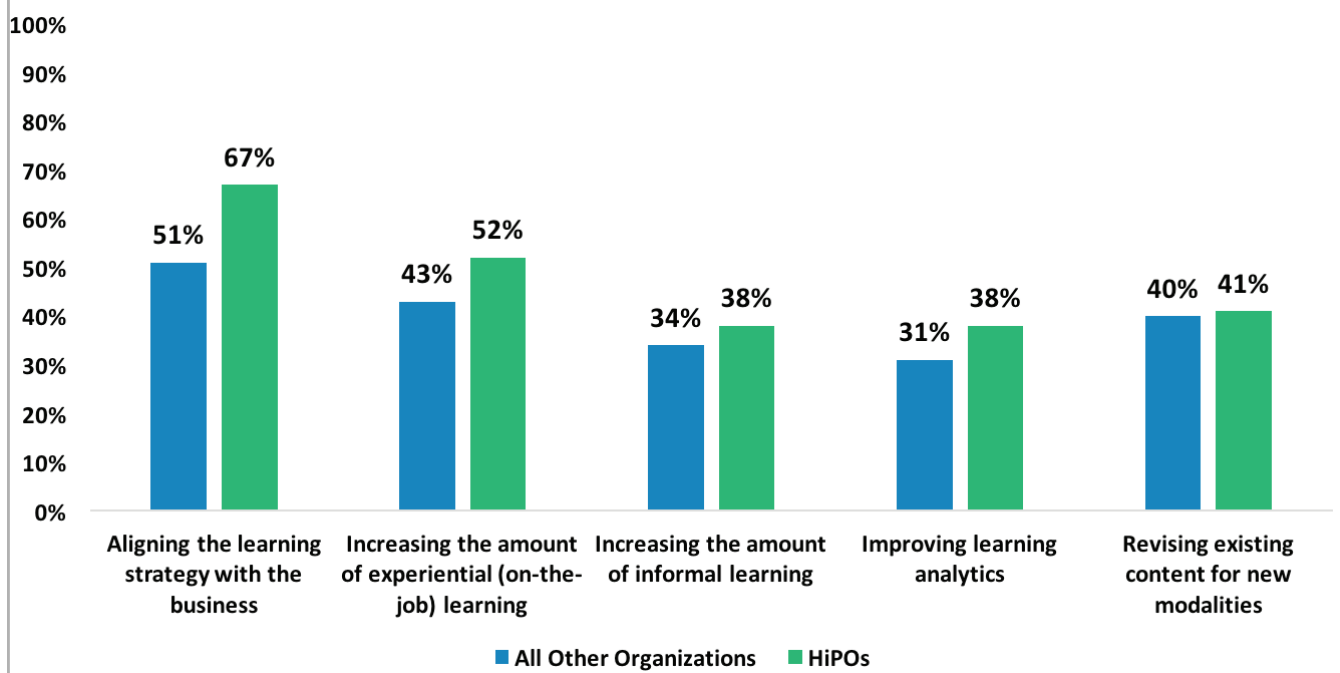Source: 2016 Brandon Hall Group Learning Strategy Study (n=292)

NOTABLE INSIGHT

More than half of companies say they are either ready to address or take action on aligning the learning strategy with the business. Many companies are similarly prepared to address the blended learning initiatives as well.

Aligning the learning strategy with the business was by far the most critical initiative cited by survey respondents. This indicates an understanding of the challenge at hand and a recognition that something needs to be done. A big part of solving this challenge can be found in the rest of the list in Figure 2. Part of executing on an effective learning strategy is providing a more blended learning environment that pulls experiences from all across the learning spectrum. The need to do this is clear from the fact that increasing experiential learning, increasing informal learning, and revising content for new modalities all rank in the top six.

As we saw in Brandon Hall Group's 2016 Learning Technology Study, organizations are finally embracing the need for new technologies, new modalities, and new experiences when it comes to learning. In fact, 55% of companies said that redesigning the classroom experience was either important or critical, making it number seven on the list. This signifies a wholesale change to the way companies approach learning.

Another indication that change is under way after years of discussion and exploration is the number of companies that are prepared to actually do something about these initiatives. More than half of companies say they are either ready to address or take action on aligning the learning strategy with the business. Many companies are similarly prepared to address the blended learning initiatives as well. What is perhaps most telling, however, is that high-performing organizations (HiPOs) are even more prepared than other companies. HiPOs are companies that have seen year-over-year improvement in a group of key performance indicators that include revenue, employee engagement, customer satisfaction, turnover and organizational productivity.

| Figure 3 | Readiness to Address Learning Initiatives (Next 18-24 Months) |

Source: 2016 Brandon Hall Group Learning Strategy Study (n=63 for High-
Performing Organizations (HiPOs), n=187 for All Other Organizations)

High-performers are clearly in a better position to make these changes and move forward because they are 78% more likely to have an effective L&D strategy, according to our research.

This report will discuss the critical calls for change to develop stronger learning strategies and further diversify learning delivery to improve individual and organizational results. These assertions will be thoroughly supported by the Top 6 findings from the 2016 Brandon Hall State of Learning Study, which surveyed 439 learning and business leaders from more than 20 countries and 35 industries in the summer of 2016, and by subsequent interviews with learning leaders. (For more details, see Research Methodology, page 28).

Learning & Development Critical Calls for Change

1. Establish a Robust Learning Strategy

2. Facilitate More Learning Experiences Outside of the Classroom

3. Create an Environment with More Frequent Learning Opportunities

4. Identify Critical Skills and Competencies

The Research Findings that Support Change

1. Most companies have a learning strategy, but there is much room for improvement

2. It is critical to link the learning strategy to the business

3. Blended learning experiences get results

4. There is increased focus on experiential learning

Critical Calls for Change

This study -- along with our Learning Technology Study and discussions with learning leaders and solution providers -- has highlighted some critical calls to action to help organizations rethink their approach to learning.

1. Establish a Robust Learning Strategy

As seen in Figure 1 (page 3), about 37% of companies believe their learning and development strategy is truly effective in helping to achieve business goals. That means that nearly two-thirds of companies with a strategy in place are not all that confident it is doing what it is supposed to do. We know this matters because of the

correlation between high organizational performance and an effective learning strategy. Among HiPOs, 66% say that their L&D strategy is either effective or highly effective in helping to achieve business goals. For those companies that are not HiPOS, the number is 32%.

We also see (Figure 4) that HiPOs tend to have more robust, mature learning strategies, which clearly helps make them effective.

Nearly two-thirds (63%) of HiPOs see their L&D strategy as either above average or leading. Compare that with 37% of all other organizations. The results are clear: When the L&D strategy is well-defined and aligned with the business, learning is much better positioned to have a positive impact on the performance of the business.
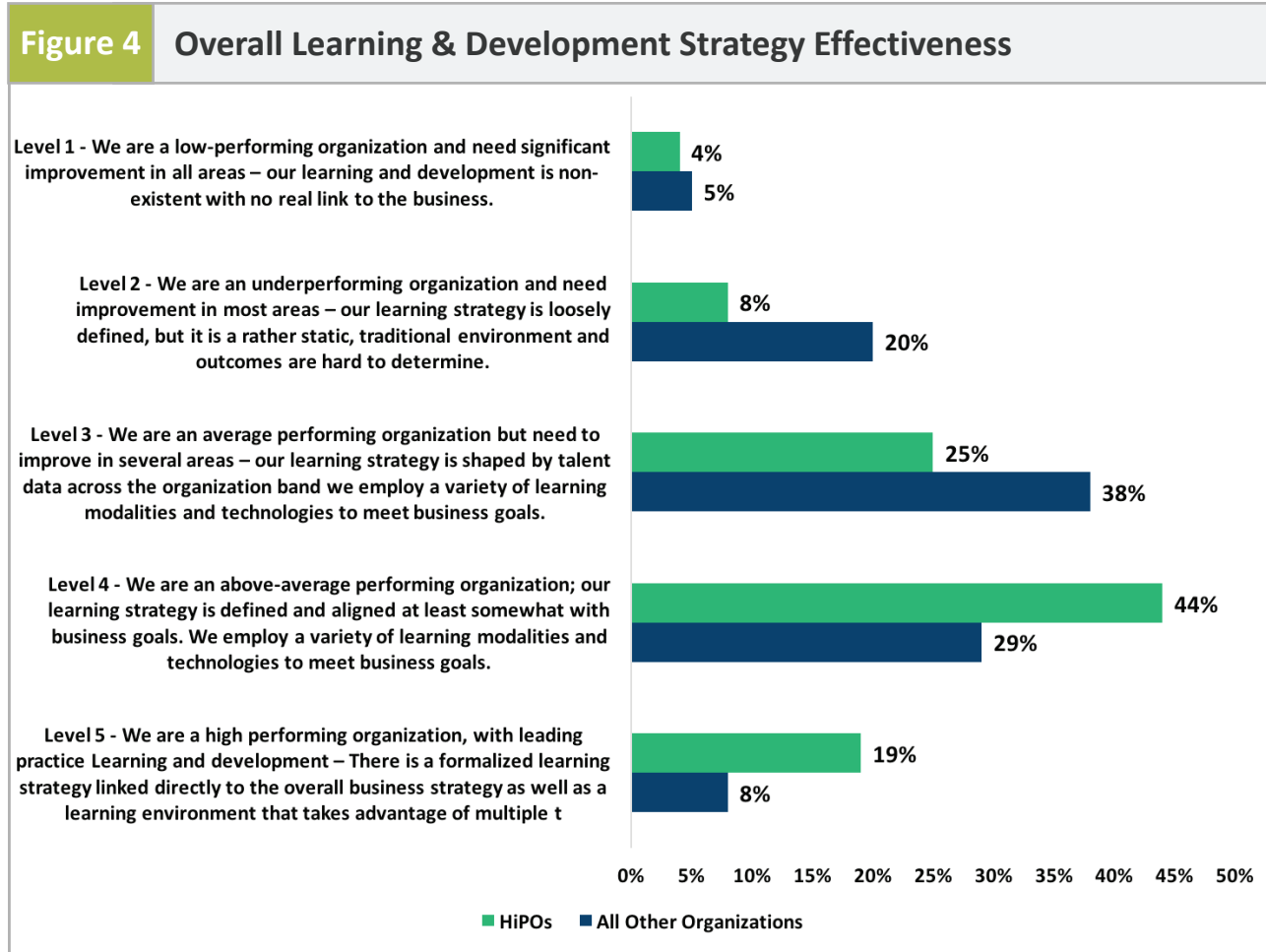
Figure 4	Overall Learning & Development Strategy Effectiveness

Source: 2016 Brandon Hall Group Learning Strategy Study (n=63 for High-Performing Organizations (HiPOs), n=187 for All Other Organizations)

2. Identify Critical Skills and Competencies

In order for learning to be effective, there needs to be a set of critical skills and competencies the strategy can target. Most companies admit that it is important to identify these skills and competencies, define the required capabilities for each of them, and design the learning content to meet these needs.

Figure 5	Importance of Addressing Critical Skills/Competencies

We have identified our critical skill and or competencies. — 86%

We have defined the capabilities required for each critical skill/competency — 80%

We have defined the learning content required to satisfy each critical skill/competency. — 79%

Source: 2016 Brandon Hall Group Learning Strategy Study (n=278)

However, few companies believe they are very effective at doing these things. Fewer than half of companies overall say they are effective at it, and only a select few believe they are very effective. However, we again see a correlation between high performing organizations and addressing critical skills and competencies.
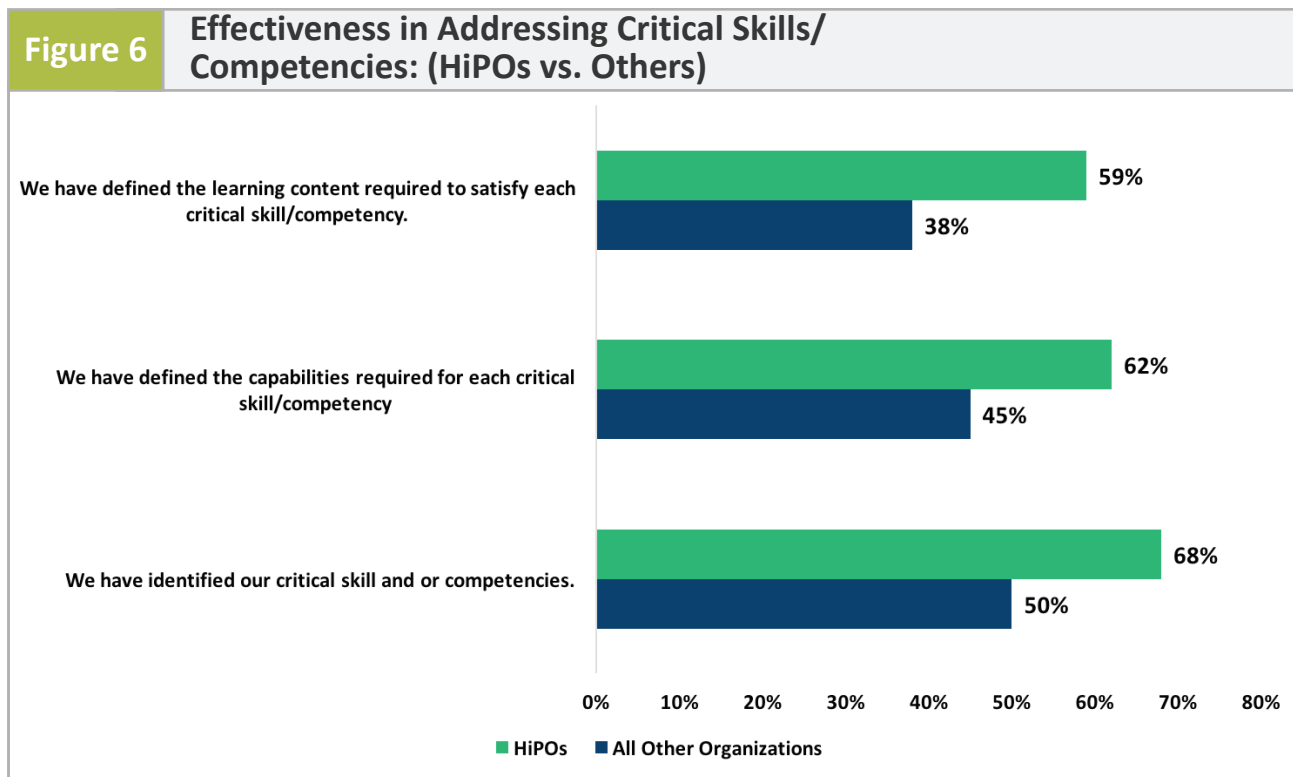
Figure 6	Effectiveness in Addressing Critical Skills/ Competencies: (HiPOs vs. Others)

We have defined the learning content required to satisfy each critical skill/competency.
- HiPOs: 59%
- All Other Organizations: 38%

We have defined the capabilities required for each critical skill/competency
- HiPOs: 62%
- All Other Organizations: 45%

We have identified our critical skill and or competencies.
- HiPOs: 68%
- All Other Organizations: 50%

■ HiPOs ■ All Other Organizations
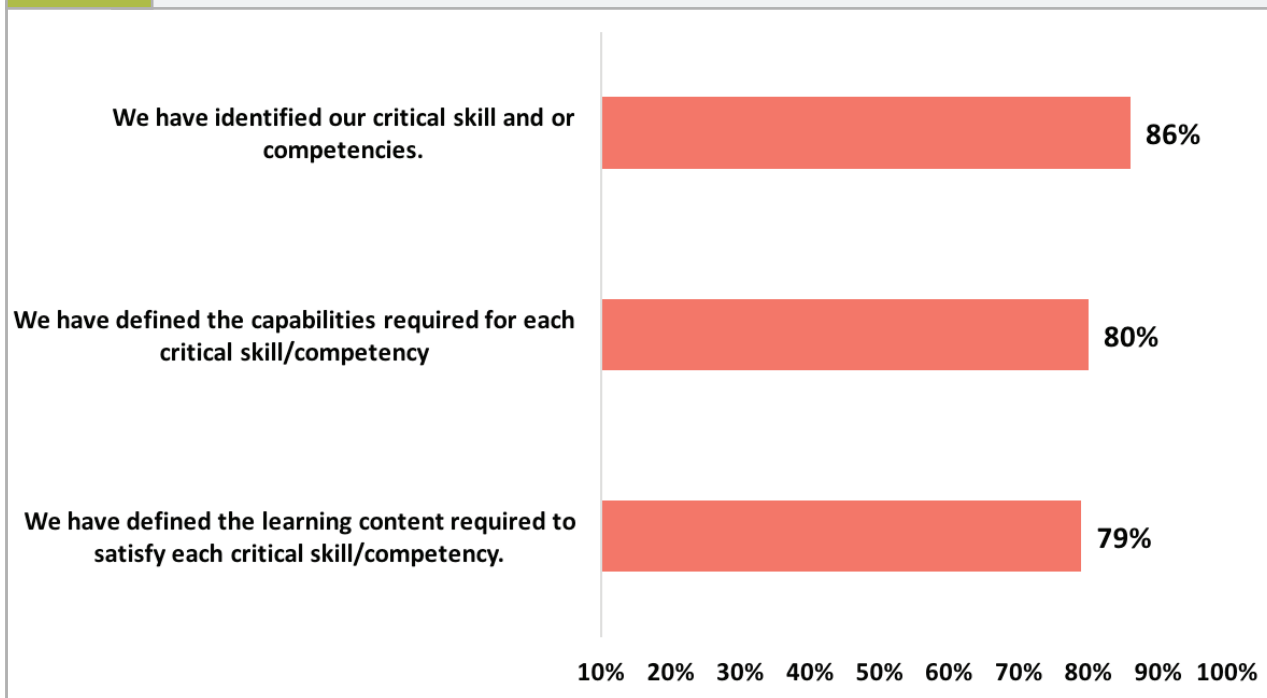
Source: 2016 Brandon Hall Group Learning Strategy Study (n=63 for High-Performing Organizations (HiPOs), n=187 for All Other Organizations)

HiPOS are simply more likely to identify, define and address skills and competencies more effectively. It is telling to note that the biggest gap (55%) comes when defining the learning content required to make sure people have the critical skills and competencies they need. It indicates that even if you are able to identify what is needed, if you cannot execute, it is meaningless.

3. Create an Environment with More Frequent Learning Opportunities

Without question, in-person instructor-led classroom training is the number one way organizations deliver learning today. Yet organizations recognize the fact that people need to connect to learning relatively frequently in order to be effective at their jobs.

Figure 7 | **Frequency of Learning Opportunities for Job Effectiveness**
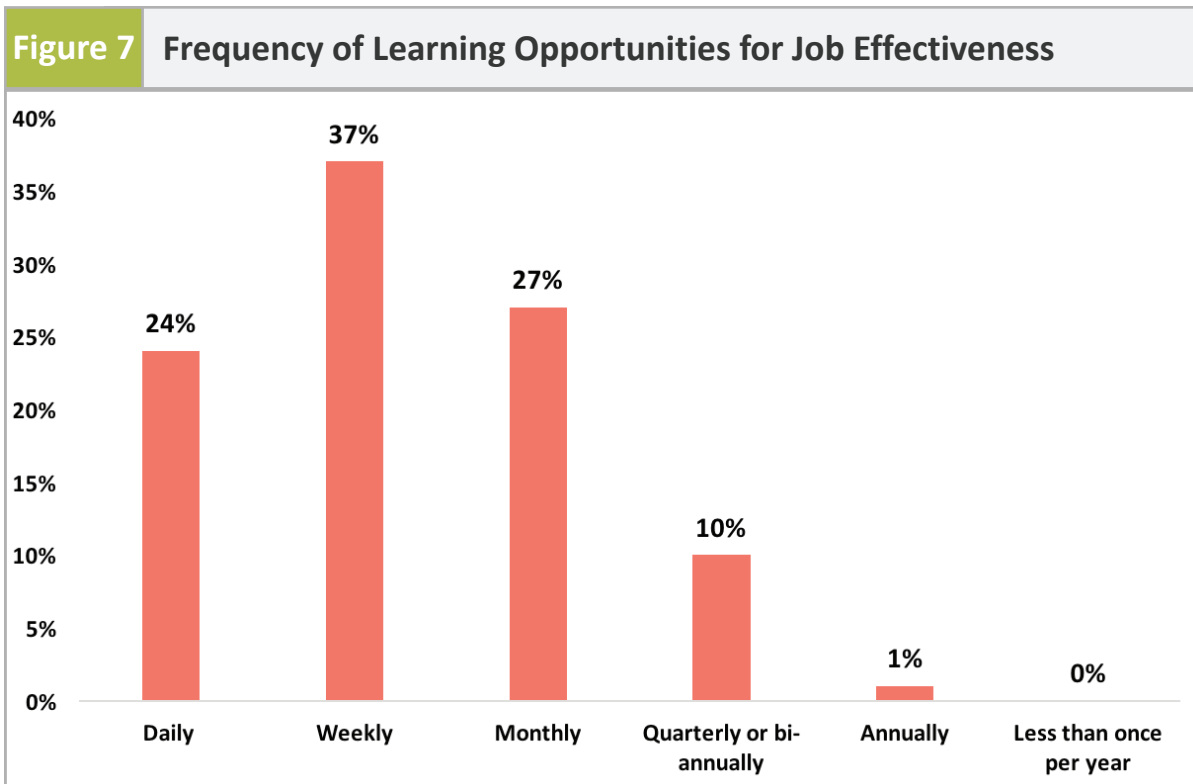
Source: 2016 Brandon Hall Group Learning Strategy Study (n=289)

More than 60% of companies expect their employees to interact with learning resources weekly or daily. A learning environment that relies heavily or exclusively on classroom ILT or large-scale courses cannot possible achieve this level of frequency. It would be difficult to deliver that kind of learning on even a monthly basis. This means organizations have to re-think their learning strategy to make learning more of an embedded activity that occurs as part of the normal workflow, rather than separate from it. Here are the characteristics that represent embedded learning:

- **Contextual**
  - o Role
  - o Location
  - o Development path

- **Small**
  - o Short videos
  - o Quick updates
- **Informal**
  - o Everyday
  - o Ad hoc
- **Mobile**
  - o Down time
  - o Moment of need
- **Social**
  - o Discussions
  - o Recommendations

4. Facilitate More Learning Experiences Outside of the Classroom

Brandon Hall Group's 2016 Learning Technology Study found that from a technology standpoint, companies are predominantly focused on exploring new learning modalities and delivering a truly blended experience. From an L&D strategy standpoint, organizations are also focused on a more blended, personalized learning experience. As we have seen throughout this study, HiPOs are taking the lead with this type of learning environment.

Figure 8	Importance of Delivering a Blended Learning Experience : (HiPOs vs. Others)
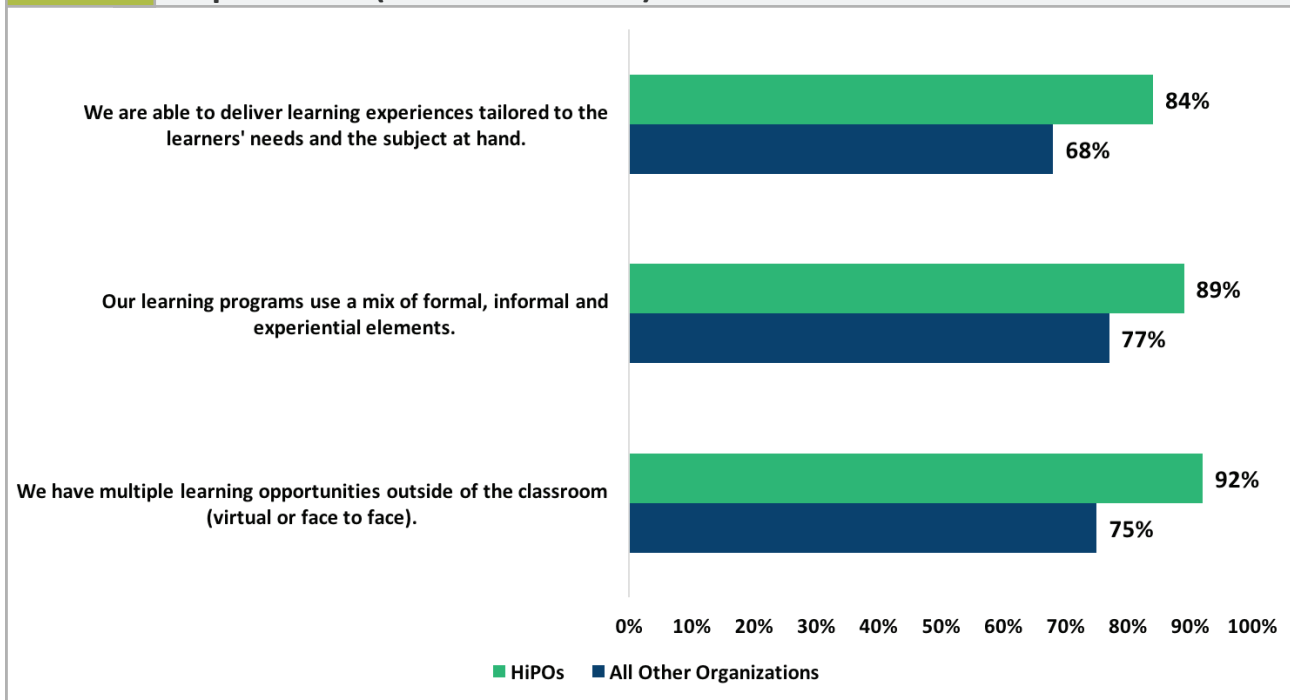
We are able to deliver learning experiences tailored to the learners' needs and the subject at hand.
- HiPOs: 84%
- All Other Organizations: 68%

Our learning programs use a mix of formal, informal and experiential elements.
- HiPOs: 89%
- All Other Organizations: 77%

We have multiple learning opportunities outside of the classroom (virtual or face to face).
- HiPOs: 92%
- All Other Organizations: 75%

■ HiPOs ■ All Other Organizations

Source: 2016 Brandon Hall Group Learning Strategy Study (n=63 for High-Performing Organizations (HiPOs), n=187 for All Other Organizations)

HiPOs see these types of learning experiences as more important to their success. Not only are they focused on blended learning outside of the classroom, but they are 23% more focused on delivering a personalized learning experience. Learning that is relevant to the learners' needs is simply more engaging and more effective. And HiPOS are better at delivering on these concepts.
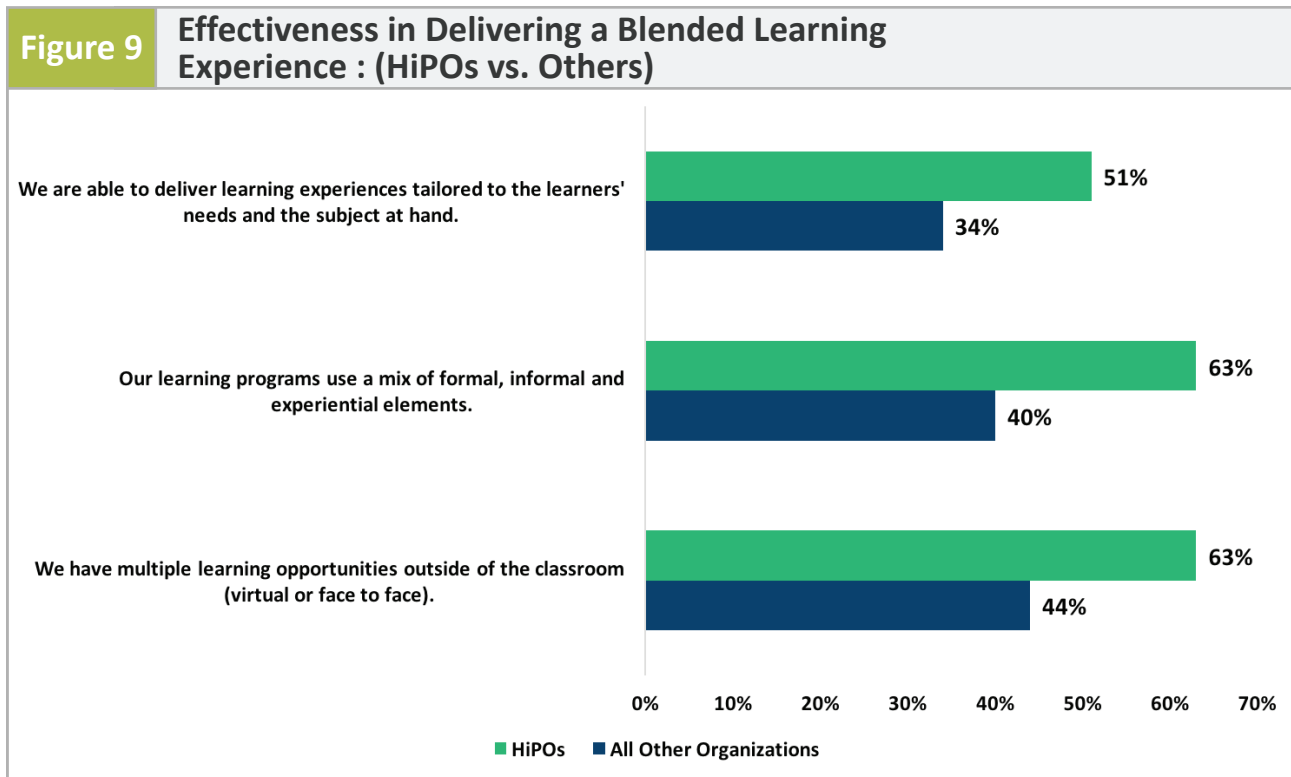
| Figure 9 | Effectiveness in Delivering a Blended Learning Experience : (HiPOs vs. Others) |

Source: 2016 Brandon Hall Group Learning Strategy Study (n=63 for High-Performing Organizations (HiPOs), n=187 for All Other Organizations)

Our Research: 4 Key Findings

Organizations need to spend more time developing a strong learning and development strategy that is rooted in business outcomes and delivers and effective, learner-focused experience. This is embodied in the key findings derived from our current State of Learning Study.

1. Most Companies have a Learning Strategy, but there is Much Room for Improvement

We've already seen how many companies are operating without an L&D strategy, as well as how many are working with a subpar strategy. These companies are stumbling around in the dark, creating and delivering learning programs they hope learners will like and, if they get lucky,

may randomly move the needle on a business outcome. This is essentially learning for learning's sake, and is the reason so many organizations have no idea what the ROI for learning may be. When we look a little closer at the maturity of the various L&D strategies in place, we see that there are relatively few companies working with a robust strategy behind them.

Figure 10	Learning Strategy Maturity Model

9%
Level 5
Innovatice
There is a formalized learning strategy linked directly to the overall business strategy as well as a learning environment that takes advantage of multiple technologies to deliver not just learning, but performance.

34%
Level 4
Optimized
Learning strategy is defined and decently aligned with business goals. A variety of learning modalities and technologies are deployed to meet business goals.

33%
Level 3
Standardized
Learning strategy is shaped by talent data across the organization and tenuously linked to the business. We employ a modest variety of learning modalities and technologies.

19%
Level 2
Developing
Learning strategy is loosely defined, but it is executed in a rather static, traditional environment and outcomes are hard to determine.

4%
Level 1
Non-existent
Learning and development is non-existent with no real link to the business.

Source: 2016 Brandon Hall Group Learning Strategy Study (n=389)

Less than half (43%) of companies have very mature strategies, or those in the "Optimized" or "Innovative" categories. These companies have alignment between their learning strategy and the business, and delivering multiple types of learning experiences. And there is a clear correlation between L&D strategy maturity and high

performance. Among HiPOs, 64% have highly mature learning strategies. HiPOS are twice as likely to have an Innovative (Level 5) learning strategy than everyone else – 19% compared to 9.5%.

These mature strategies greatly influence how these companies approach learning, as the study shows. The connection to the business, the multiple learning experiences, the ability to measure outcomes – these are all hallmarks of companies with strong strategies and are linked to high performance.

2. It is Critical to Link the Learning Strategy to the Business

The two major components of the mature learning strategy are a link to the business and a diverse learning ecosystem. First, we look at how well the learning strategy is aligned to the business. As noted earlier, only 43% of companies say their learning strategy is at least decently aligned to the business. This means that more than half of companies are essentially delivering learning in a vacuum, with no real idea how it is influenced by or impacts the business. This is a huge challenge, because aligning the strategy to the business is the most important learning initiative and organizational performance is the most important outcome for learning.

Figure 11	Most Important Learning Outcomes
	Important/Critical to the Business
Improved organizational performance	93%
Improved individual performance	90%
Improved employee engagement	84%
Reduced skill/competency gaps	84%
Reduced time to productivity	80%

Source: 2016 Brandon Hall Group Learning Strategy Study (n=439)

Despite the clear criticality of learning's ability to improve organizational performance, very few companies say their learning is very effective at doing so. But as an organization's strategy moves up the maturity curve, the more effective they are achieving these outcomes. In fact, the differences in effectiveness are staggering.

Figure 12	Effectiveness of Learning to Achieve Outcomes: (Levels 4/5 vs. Levels 1/2)
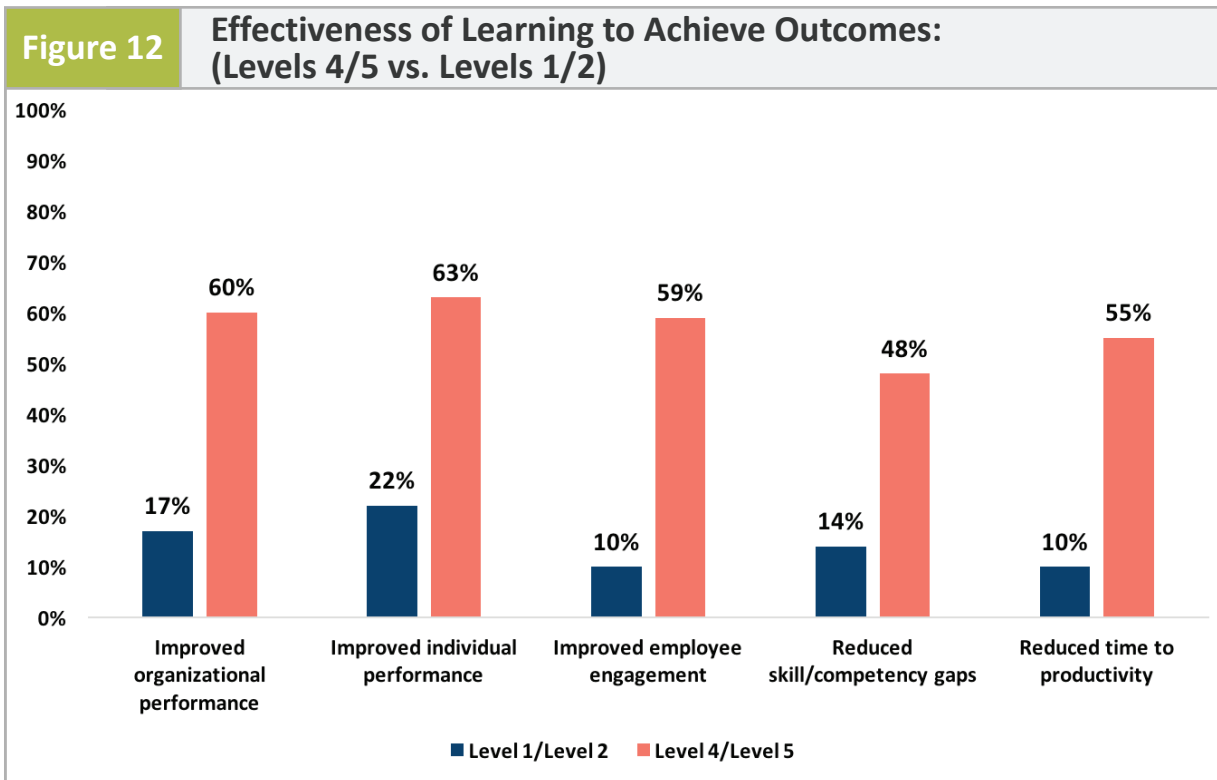
Source: 2016 Brandon Hall Group Learning Strategy Study (n=253)

Organizations with a weak or even no real L&D strategy have an incredibly difficult time moving the needle on any outcome. The area in which they have the most impact is improving individual performance, and less than one-quarter say they are effective or very effective in doing so. At the other end of the spectrum, organizations with more mature strategies (Levels 4 and 5) are three, four, even sometimes five times more likely to say they are effective at achieving these critical learning outcomes.

3. Blended Learning Experiences Get Results

The study found that HiPOS are more focused on, and more effective at, delivering a blended learning experience. What are they getting for their efforts? Across the board we see that companies that are delivering multiple learning opportunities outside of the classroom and using a mix of formal, informal and experiential learning get better results. The chart below shows that the groups who do this (Yes) are more effective at achieving learning outcomes than those that do not (No).

| Figure 13 | Effectiveness in Delivering a Blended Learning Experience |
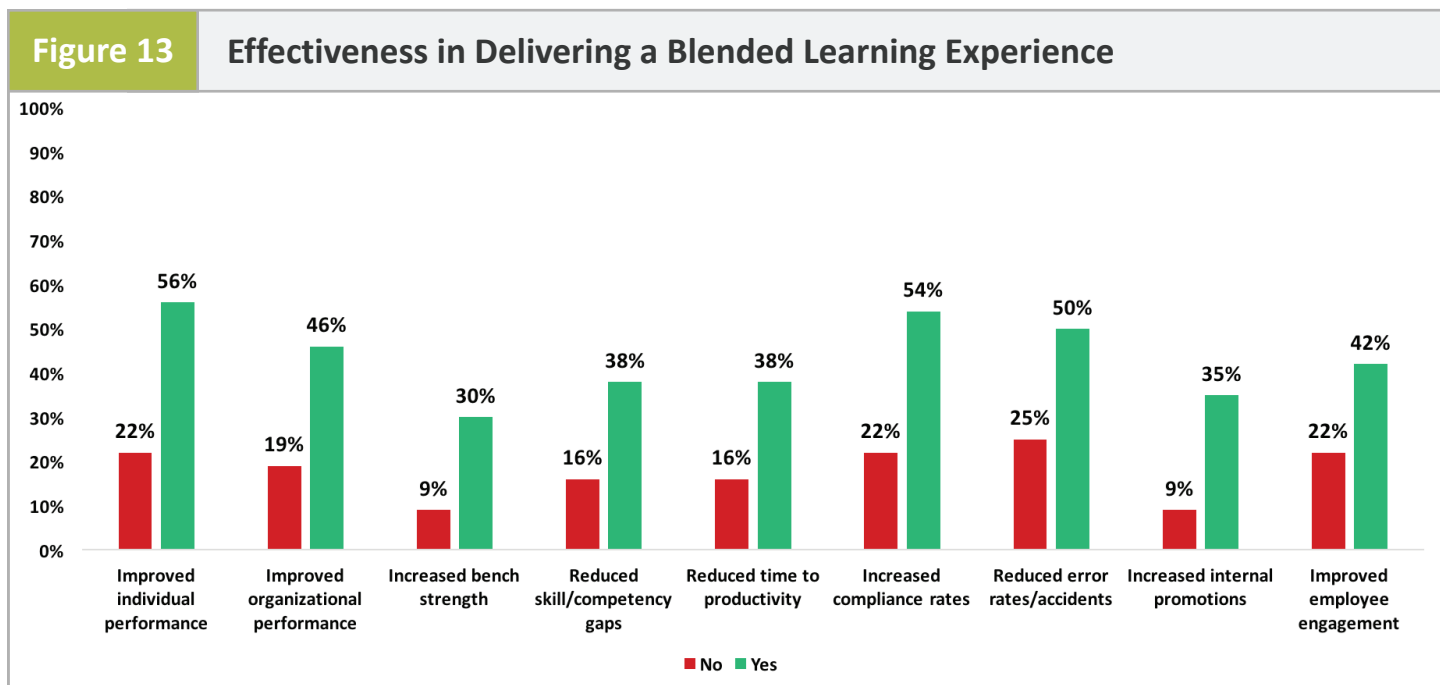
Source: 2016 Brandon Hall Group Learning Strategy Study (n=253)

It's not even close. Organizations that do not put a premium on blended learning experiences outside of the classroom are at a severe disadvantage when it comes to moving the needle on the very outcomes learning is designed to achieve.

What does a blended experience entail? First and foremost, it does not mean the end of the classroom or formal learning in general. In fact, we expect the classroom to continue to be the number one delivery method for learning. Instead, formal learning can and should be the center of an effective blended learning strategy. Companies need to approach formal learning from a new, blended mindset. The graph below illustrates how much better companies with mature learning strategies (Levels 4 & 5 from the Maturity Model) are at formal learning than those at the other end of the spectrum:

Figure 14	Effectiveness at Delivering Formal Experiences

Reduced time to productivity
- Level 4/Level 5: 55%
- Level 1/Level 2: 10%

Our employees are given clear development paths with prescriptive content to address competencies, skills and compliance.
- Level 4/Level 5: 23%
- Level 1/Level 2: 13%

Our catalog of eLearning courses is easy to navigate and works on multiple devices.
- Level 4/Level 5: 47%
- Level 1/Level 2: 18%

We deliver engaging classroom instruction, with interactivity and collaboration.
- Level 4/Level 5: 80%
- Level 1/Level 2: 42%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

■ Level 4/Level 5 ■ Level 1/Level 2

Source: 2016 Brandon Hall Group Learning Strategy Study (n=254)

The pattern continues for informal and experiential learning as well. Even though companies overall are still struggling to execute perfectly in these areas, those with stronger strategies fare much better.

Figure 15 — Effectiveness at Delivering Informal Experiences

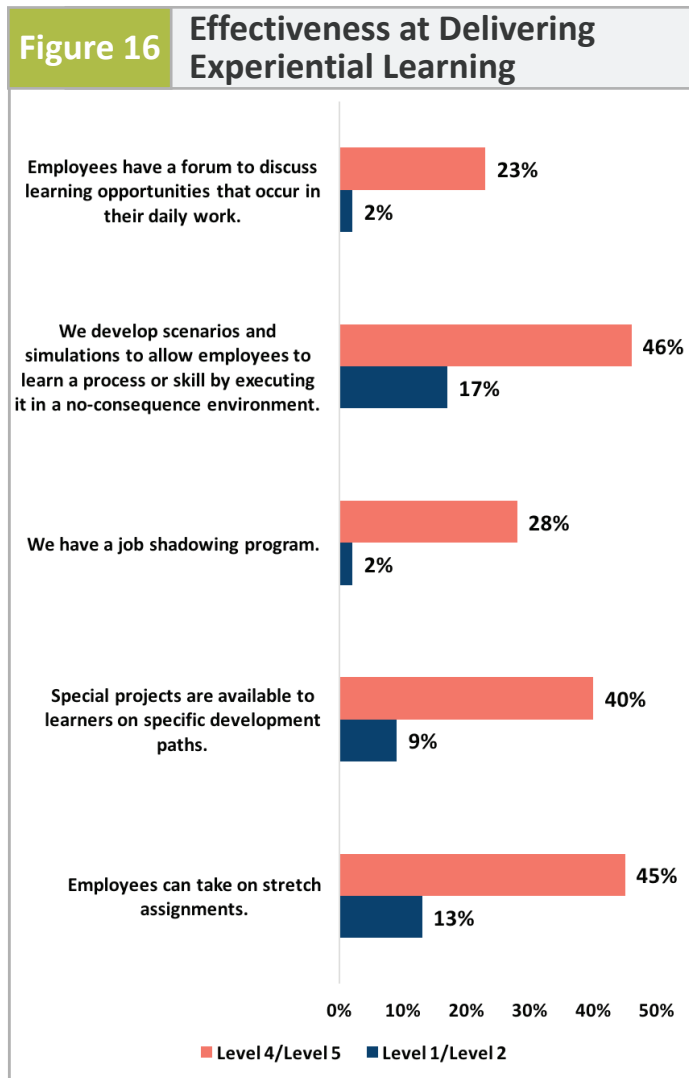| Statement	Level 4/Level 5	Level 1/Level 2
We have an established coaching/mentoring program	45%	14%
Learners have the opportunity to meet virtually to discuss topics without the need for a formal scheduling system	39%	11%
Learners are able to easily find subject matter experts within the organization	44%	16%
Learners are able to discuss content, courses and development paths in the learning environment	33%	6%
Learners are able to generate and contribute their own content	28%	7%
Learners are able to easily share content with one another	36%	9%
Learners are able to comment on or rate content	49%	22%

Source: 2016 Brandon Hall Group
Learning Strategy Study (n=253)

Figure 16 — Effectiveness at Delivering Experiential Learning

| Statement	Level 4/Level 5	Level 1/Level 2
Employees have a forum to discuss learning opportunities that occur in their daily work.	23%	2%
We develop scenarios and simulations to allow employees to learn a process or skill by executing it in a no-consequence environment.	46%	17%
We have a job shadowing program.	28%	2%
Special projects are available to learners on specific development paths.	40%	9%
Employees can take on stretch assignments.	45%	13%

Source: 2016 Brandon Hall Group
Learning Strategy Study (n=255)

This surge in blended learning approaches is being fueled greatly by renewed interest in the 70:20:10 Framework. Research from more than 20 years ago identified that in an organizational setting, 10% of what people learn comes from formal experiences, 20% comes from informal interactions, and 70% comes from experiential or on-the-job learning. New technologies have greatly enhanced a company's ability to deliver these other types of learning, but formal learning still remains the main focus – far more than the 10% of the model would imply.

And that is the heart of the matter. The 70:20:10 Framework is just that – a framework. It is a model that can be used to guide how companies approach their learning. It is by no means a prescription or a precise formula. But recognizing that people learn in many more different ways than a class or course alone can deliver is the first step in delivering an effective blended learning environment.

Based on the result of this and other studies conducted by Brandon Hall Group, as well as our engagements with leading edge companies and solution providers, we have developed a more straightforward blended learning model: The Learning & Performance Convergence model.

Figure 17	Learning & Performance Convergence Model
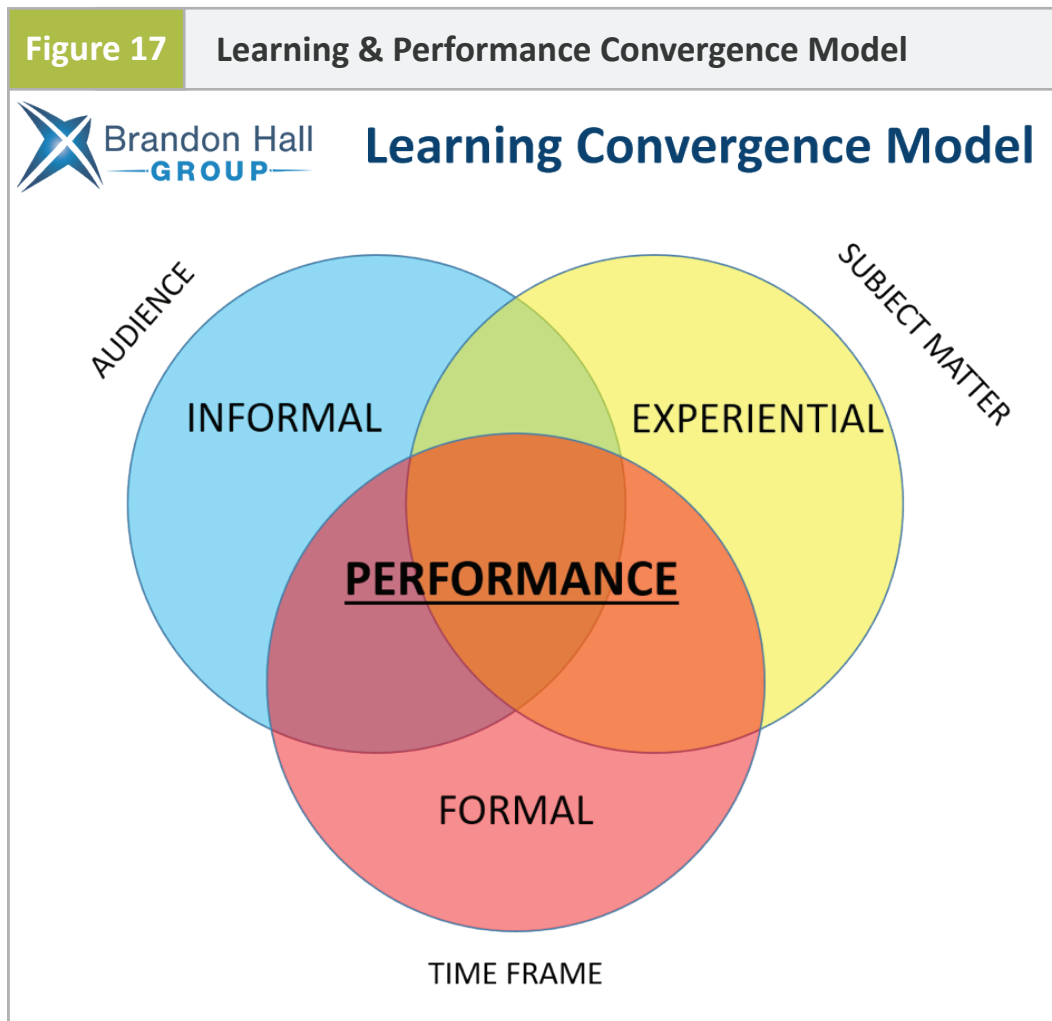
Source: Brandon Hall Group 2016

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Using the Learning Convergence Model, the mix of learning types will change from program to program, depending on the desired performance outcome. Other influencers include the audience, the subject matter, and the required time frame.

Too often, organizations develop learning where the sole outcome is learning itself. In other words, the disconnect between learning and the business leads to programs where the only required outcomes are completion, and perhaps comprehension. Neither of these things indicate whether or not the learning is improving the business. Instead, the outcome of learning needs to be performance. We saw earlier how organizations with a blended approach to learning saw much better results across a wide array of outcomes.

Using this model, companies need to understand that blended learning is not a by-the-numbers application of 70:20:10, nor is it a sequential roll-out of formal first, then informal, then experiential. In this model, the mix of learning types will change from program to program, depending on the desired performance outcome. Other influencers include the audience, the subject matter, and the required time frame.

With that in mind, a program can include elements of all three learning types, or maybe just two. Some programs could require almost all formal learning, while others can focus more on experiential. The key is that each of the types should be at the organization's disposal, and each learning type can and should overlap, rather than one preceding the other. In essence, to really do learning the right way, you need a game plan for each learning topic you offer.

4. There is an Increased Focus on Experiential Learning

The way in which people in organizations learn the most, according to the 70:20:10 model, is through experiential learning. This is hardly a revelation; most people are familiar with the effectiveness of learning by doing. Being

able to learn through trial and error, observing examples and trying new things have been the ways people have learned since the dawn of time. It is, therefore, unsurprising that organizations are trying to find ways to increase -- or at least facilitate -- the experiential learning that occurs.

First, the study shows how critical organizations consider experiential learning to be for their success, especially when compared to formal and informal learning

Figure 18	Importance of Learning Types to Business Success
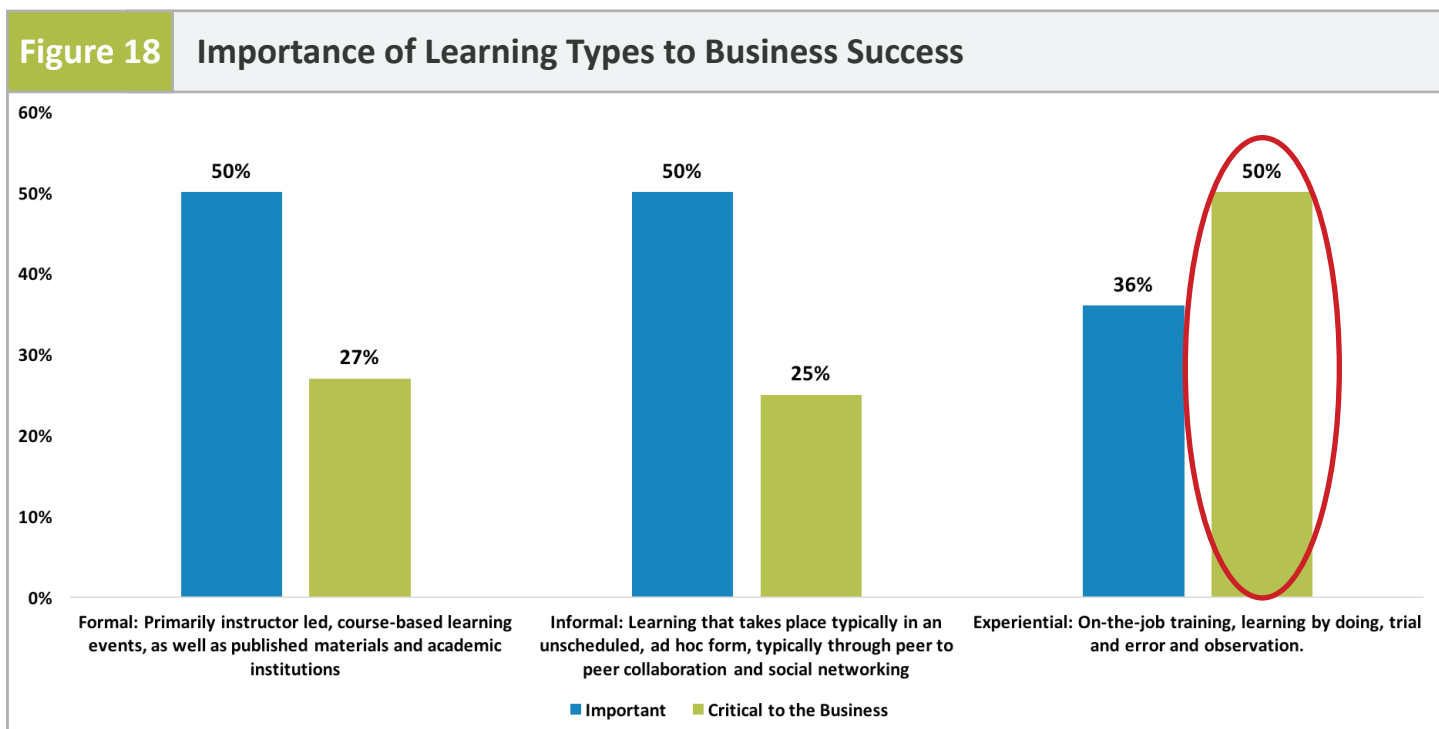
Source: 2016 Brandon Hall Group Learning Strategy Study (n=439)

Almost twice as many companies consider experiential learning to be critical to the success of their business than say the same about formal or informal learning. There is no doubt that companies need to find ways to deliver these experiences. In fact, two-thirds of companies say their focus in this area will either increase or increase significantly over the next 12 to 15 months.

This focus is important, as most organizations believe their experiential learning processes are somewhat immature at this point.

Figure 19 | Maturity of Experiential Learning
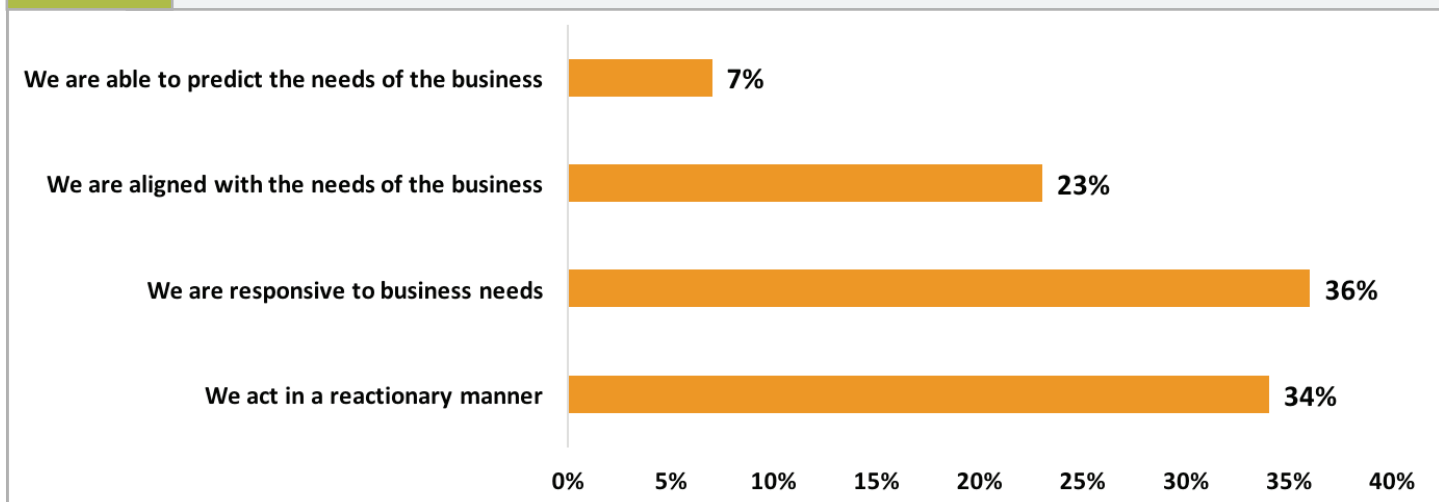
Source: 2016 Brandon Hall Group Learning Strategy Study (n=439)

Only 7% of companies believe they are able to predict and address the needs of the business with their experiential learning efforts. Another 23% say that their experiential learning endeavors are aligned with the business. More than one-third, however, are reactionary, using experiential learning to address needs after the fact. Experiential learning needs to play a bigger role so organizations can apply it in a proactive way that helps meet the goals of the business.

Conclusion

We realize that putting the research and the critical calls for change to work is not as easy as just reading and doing. When you are determining how to make the changes you know you need to make to improve the business performance in your organization, we recommend these leading practices, gleaned from our research, countless strategy engagements with companies of all sizes and industries, and interviews with learning leaders who have responded to this or other learning studies over the past three years:

People

1. Build enough internal skill to make your L&D function effective. Relying on external resources, technology and expertise can be part of a strong learning strategy, but no one knows the organization better than the people who work there.

2. Ensure the learning leader has the influence to be a strategic part of the leadership team. Without access and knowledge to the organization's overall objectives, as well as the objectives for other parts of the business, learning cannot connect to the company's goals.

3. As learning evolves to change with the business, rely on people outside of the learning function to evangelize and enable the change. Whether it's new technology or a shift in vision, change management begins with people. The deeper the support among leaders in your organization, the easier it will be to enable change.

Process

1. Develop a learning strategy where performance is the outcome, not just learning itself.

2. Continuously examine the strategy to ensure it reflects the current state of the business and the direction in which it is headed.

3. Commit your organization to strategic learning measurement. Learning measurement is not data collection. The vast array of data at your disposal can tell you far more than how many people completed a course. Get tools and expertise to analyze your data properly and begin to make connections to the business. Brandon Hall Group has research reports and resources related to learning measurement that can help.

Technology

1. Embrace a technology strategy that recognizes not all learning takes place within a classroom or in a course. Adoption of technologies that enable informal and experiential learning is critical to an effective blended approach.

2. The LMS is not the only learning technology that exists. You may need more, or something altogether different. Don't tie up the budget in one single solution that may not meet your needs.

3. Recognize the cultural shift for more social, mobile and informal learning experiences. While it is true Millennials are entering the workforce expecting these things, these technologies span generations and demographics.

When building your learning program it helps to follow a logical, research-driven process. Brandon Hall Group's Learning & Development Framework does just that in a comprehensive manner. It is explained in detail in a separate report in the Brandon Hall Group Member Center, but the basic elements – which we refer to as the Learning and Development Lifecycle -- are also helpful to frame your thinking in terms of improving or making changes in your learning program.

Figure 20	Brandon Hall Group's Learning and Development Lifecycle
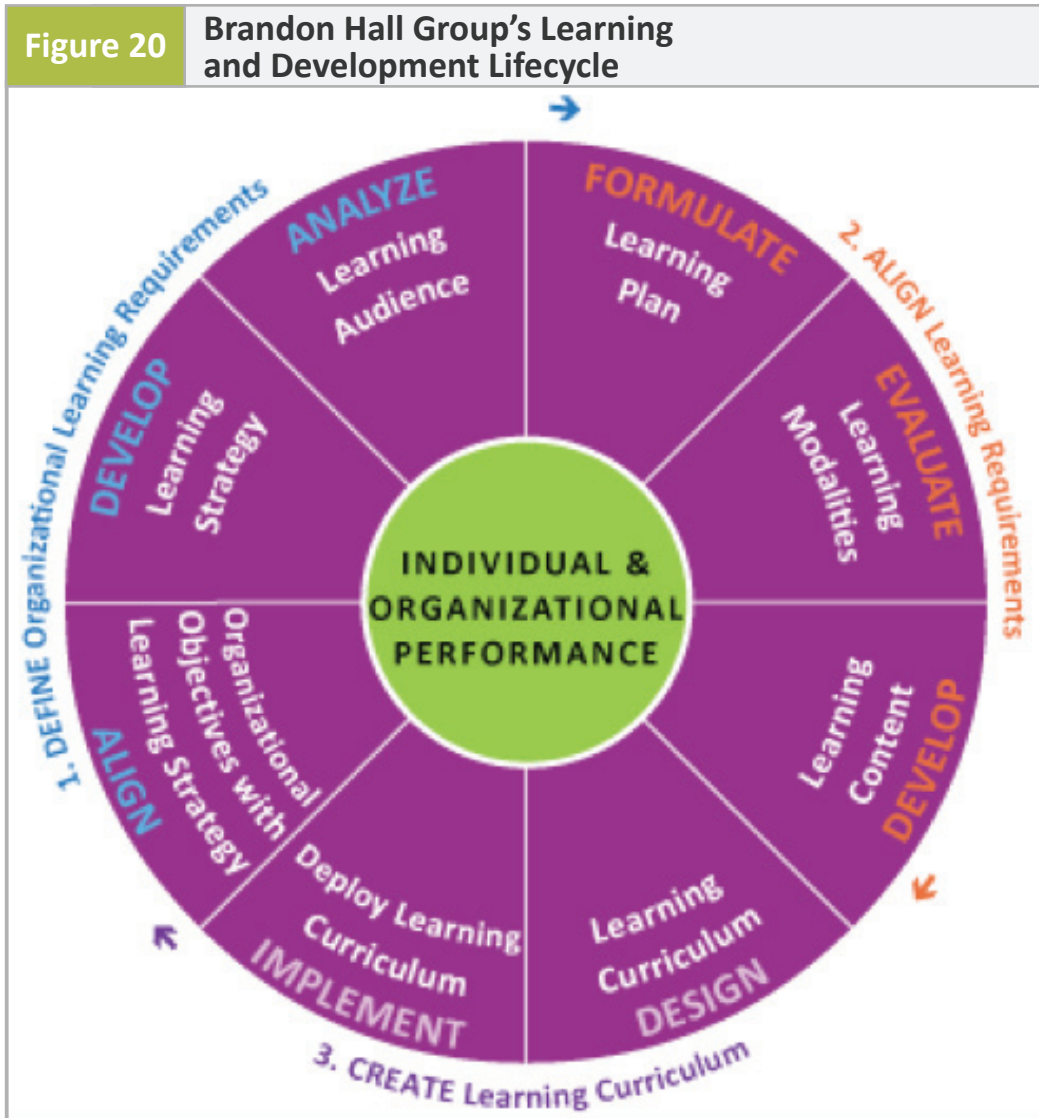
Source: 2016 Brandon Hall Group

Brandon Hall Group's Research Methodology

The online survey was conducted in the second quarter of 2016, and garnered a total of 439 responses from 35 industries and 22 countries. The survey included 27 questions, including demographic questions. Respondents were almost evenly split between small, mid-sized and large organizations. Data-only responses to questions are available online through Brandon Hall Group's DataNow™ service. Contact us at success@brandonhall.com for more information.

Employer Brand

Market Leadership

Research Methodology

Business Performance

Client Loyalty

Client-Centered Business Goals

Evaluation of Business and Talent Landscape
We study current trends to hypothesize about how they might influence future events and what effect those events is likely to have on your business.

Quantitative Surveys
To test our hypothesis, we gather empirical insights through formal and informal surveys completed by Executives, Chief Human Resources Officers, VPs of Talent and other business leaders as well as HR, Learning and Talent Leaders and employees.

Qualitative Interviews
To check assumptions generated from surveys and to add context to the empirical survey data, we talk to Executives, Chief HR Officers, VPs of Talent and other business leaders as well as HR, Learning and Talent Leaders and employees.

Analytics-Based Reports and Tools
After verifying our position internally, in alignment with scholarly research, and the market and completing rigorous peer reviews, our position is documented and published, made available to our members, in the form of reports, tools and online searchable databases.

Market Testing
We fortify and validate our initial findings, leading practices and high impact processes within the analyst environment, our own Advisory Board and select other clients and prospects that offer fair assessment of the practicality and usability of our findings, practices, and processes. Again we add new perspectives as appropriate before readying the research for publication.

Emergent Trends
After studying and analyzing all collected data, we see and document patterns emerging within high performing companies. We create initial drafts of our findings, leading practices and high impact processes.

Expert Resident Knowledge
Our quantitative and qualitative findings are shared within our internal research community and rapidly debated in peer review sessions to test validity and practicality.

Scholarly Reviews
We study and analyze renowned academic research comparing and contrasting their findings to our own and again engage in rapid debate to ensure our findings and analysis stand the tests of business usability. New perspectives are shaped and added as appropriate.

Phase One · *Phase Two* · *Phase Three* · *Phase Four* · *Phase Five*

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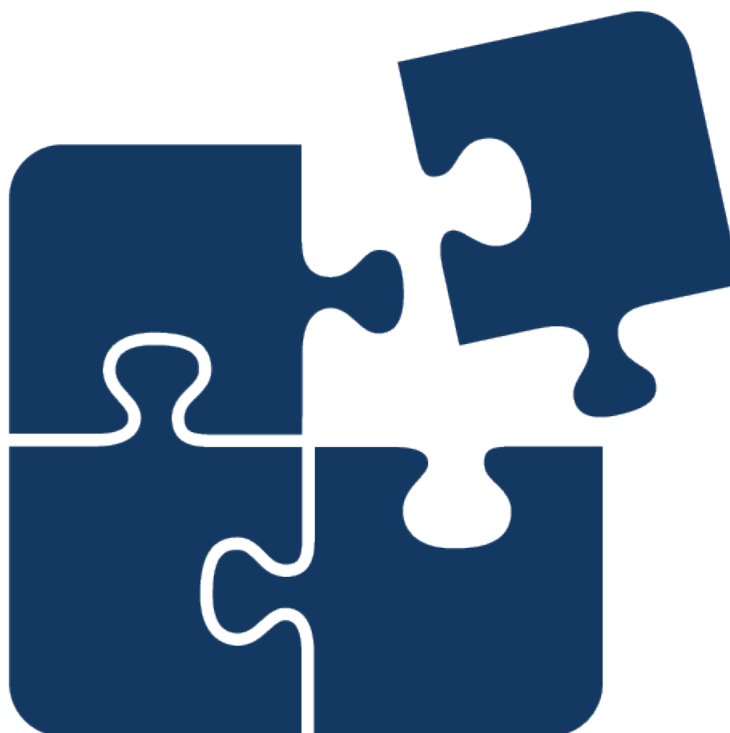- Maturity Model
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