

Satisfaction with Learning Technology Inextricably Linked to Strategy and Planning

Research Summary

Brandon Hall Group Research Team
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About the Study

Brandon Hall Group's 2017 Learning Technology Study provides an in-depth look at how organizations plan, develop and management competencies and the impact those practices have on talent management and the business.

290 Global Responses



20 Countries

- **67%** US/Canada
- **22%** EMEA
- **8%** APAC
- **3%** Latin America



27 Industries

Small, Mid-Size, and Large Organizations



31%

below 500 employees



32%

500 - 5,000 employees



37%

5,000+ employees

33% Learning Professional

23% Head of Learning/LD

19% Technology role

15% Executive/Senior leadership

6% Business manager role

4% Head of HR/Talent

Satisfaction with Learning Technology Inextricably Linked to Strategy and Planning

KEY FINDINGS

- With a wide variety of learning technologies now available, the percentage of organizations deploying an LMS has dropped from 85% in past research studies to under 75% in 2017.
- Nearly two-thirds of companies have either a poorly defined learning technology strategy, or – worse – no strategy at all.
- Inability to integrate technologies surpassed poor user experience as the biggest barrier to satisfaction with learning technology.
- Organizations without a formal technology selection team were 60% more likely say their selection process was ineffective.

Source: 2017 Brandon Hall Group Learning Technology Study (n=290)

Overview

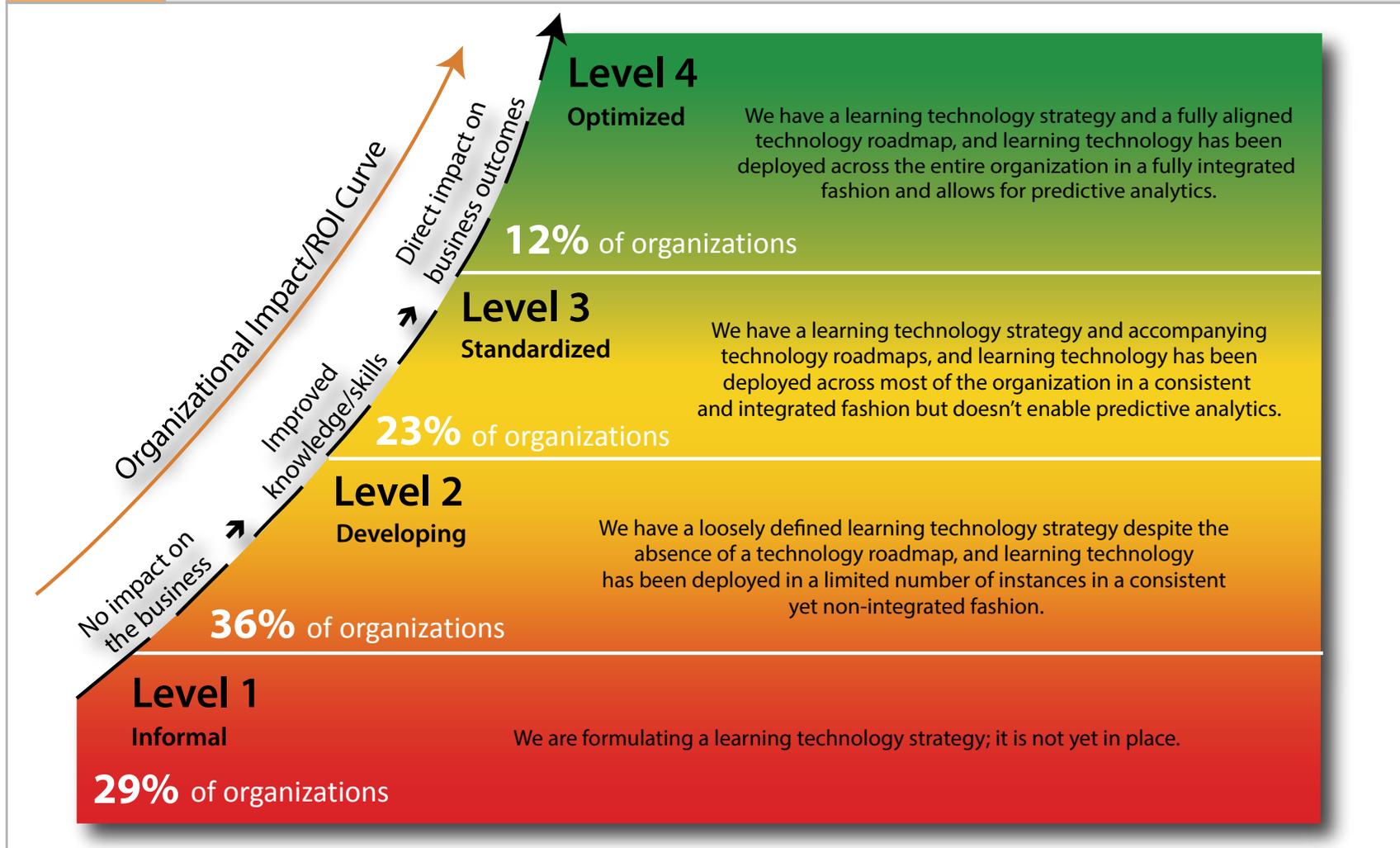
In a relatively short period of time, the learning technology landscape has exploded from a set of well-defined tools, like an LMS or authoring tools, to a vast array of solutions aimed at delivering a variety of learning experiences and content across a spectrum of devices and media.

The complexity of the technology landscape means that organizations need to be highly prepared to navigate if they want to be sure they are deploying the right solutions to execute on their learning strategy. Unfortunately, nearly two-thirds of companies in Brandon Hall Group's 2017 Learning Technology Study have either a poorly defined technology strategy, or no strategy at all.

Brandon Hall Group designed a Learning Technology Maturity Model (next page) to analyze the different levels of sophistication organizations have when it comes to planning for, selecting, implementing, and utilizing learning technology.

Figure 1

Learning Technology Maturity Model



Source: 2017 Brandon Hall Group Learning Technology Study (n=290)

The largest group in this model is the “Developing” category (Level 2). These companies have implemented learning technology, but they have done so without a whole lot of structure or governance. The solutions they have deployed typically aren’t integrated with one another, let alone with other systems throughout the organization. There is very little in the way of analytics within this group, if any, so there is essentially nothing tying the technology rollouts back to the business. Therefore, these organizations can’t really be sure how well their technology works.

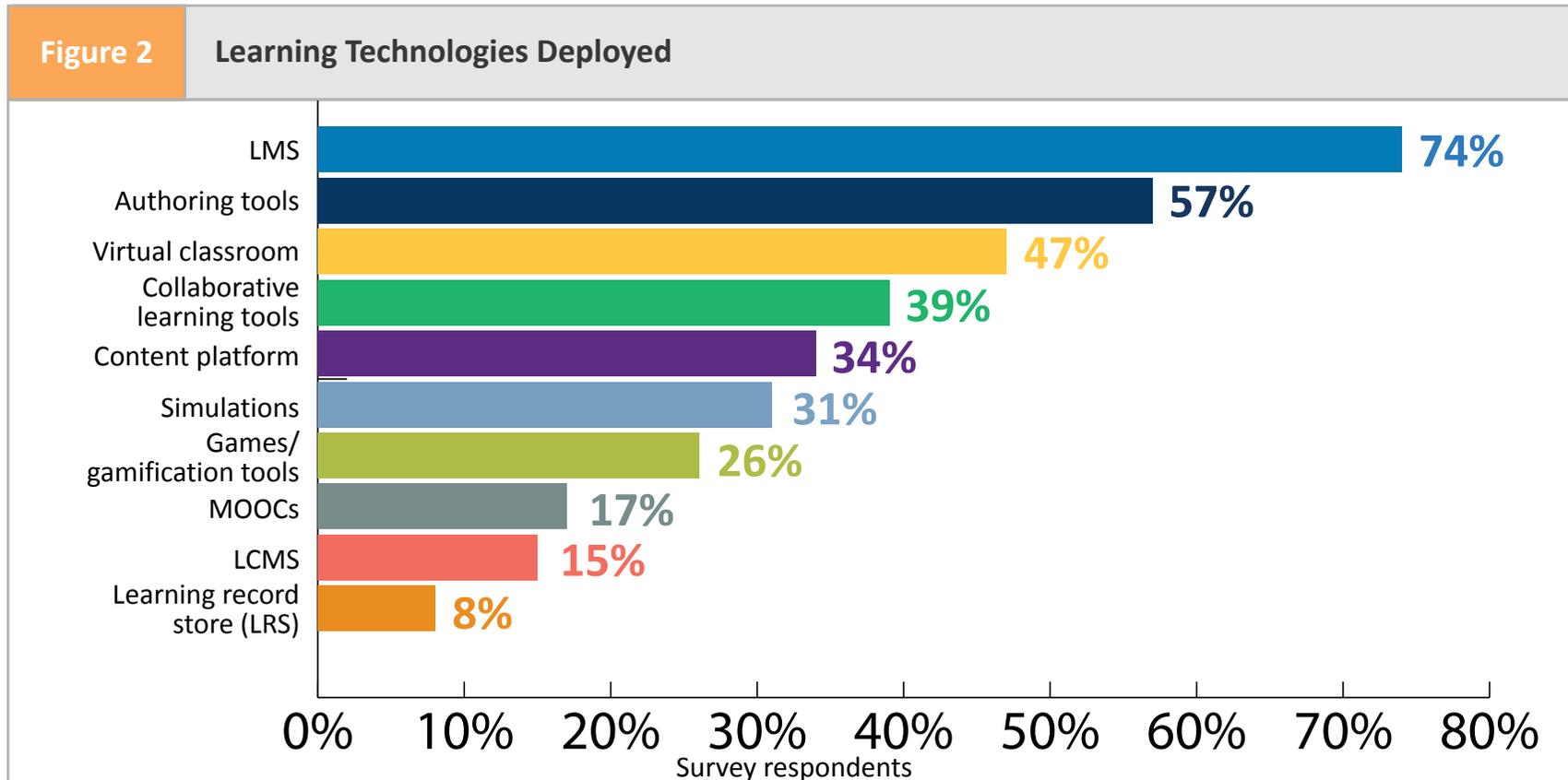
Only about one-third of the companies – those at Level 3 and Level 4 in the Maturity Model -- have a mature strategy for their learning technology and have integrated it with other systems. Only 12% of companies (those in Level 4) have the data analysis in place to draw sound conclusions about learning’s impact on the business. And while large companies (10,000+ employees) are more likely to have technology in place, the maturity levels remain about the same, with only 15% (compared with 12% overall) reaching Level 4.

Given that more learning solutions are going to be deployed in concert with one another, a strategy that centers around integration is critical. Measuring the impact these tools have on learning and the business is much more challenging if a company isn’t even sure how they all work together.

Here are four key findings from the 2017 Brandon Hall Group Learning Technology Study that may provide insight into how to get the most out of your learning technology.

1. The Learning Technology Landscape Will Grow More Complex

In the not too distant past, organizations only had to concern themselves with one type of learning technology – the LMS. In past Brandon Hall Group studies, we consistently found that around 85% of companies had deployed an LMS. Now, with such a wide variety of technologies available – some that work with an LMS and some that supplant it – we’ve seen that number drop to under 75%.



Source: 2017 Brandon Hall Group Learning Technology Study (n=290)

The LMS is still the most commonly used solution by a wide margin, but we see growing adoption of many other tools. For example, more than one-third of companies use a content platform, a solution that provides an interface on top of a content library. Nearly 40% use collaborative learning tools that connect learners to one another, through media sharing, discussions and more. Also significant is the adoption of simulations and gamification tools. For the most part, these tools are being used in conjunction with an LMS, which highlights the necessity of a good technology strategy to make sure all of these tools work together to serve the same purpose.

The landscape will only get more complicated for most companies; two-thirds plan to acquire new learning technology in the next 12 months. That means they must figure out how to roll-out, integrate and assimilate yet more learning technology – and soon.

2. User Experience and Integration are Critical

Quite often in our research, we report dismal satisfaction rates with technology across the entire HCM spectrum. In 2015, not one aspect of LMS satisfaction scored higher than 3.5 on a 5-point scale. In fact, the average satisfaction rating across 17 LMS features was 2.96 (the equivalent of 59 out 100 – an F). As seen in Figure 3 below, the LMS scores slightly better overall in 2017, but trails every other type of learning technology.

The bottom-of-the barrel satisfaction rating indicates the frustration that organizations feel with traditional LMS platforms as they

Figure 3 Learning Technology Satisfaction Ratings	
Technology Type	Average Score*
Content platform	3.92
Simulations	3.90
Virtual classroom	3.85
Authoring tools	3.84
Collaborative learning tools	3.78
Games/gamification tools	3.58
Learning record score (LRS)	3.57
MOOCs	3.32
LCMS	3.23
LMS	3.10

Source: 2017 Brandon Hall Group Learning Technology Study (n=290) *Numbers based on 5-point scale, with 5 the highest rating

try to create and deliver more modern learning experiences. Companies are much more satisfied with newer technologies like content platforms and simulations. Even games and MOOCs score better than the LMS, and these are platforms companies have been challenged to adopt.

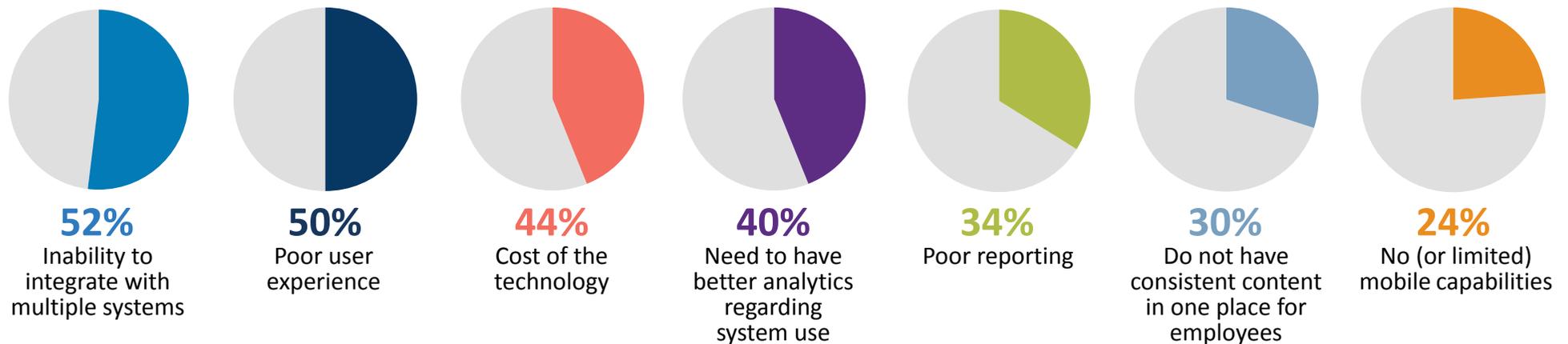
User experience has perennially been the biggest challenge with learning technology. Companies regularly complain that the platforms are not easy to use, not intuitive, and do not have a modern look and feel. Those complaints have traditionally been lodged against LMS solutions, though, and more modern tools have been designed with the end-user experience more front of mind.

In the 2017 study, integration supplanted user experience as the biggest barrier to technology satisfaction. This solidifies our findings that a strong technology strategy is required to integrate all of these learning solutions with each other and other systems throughout the business.

In fact, when we looked at the competencies companies say are important for technology providers to possess, 85% said that

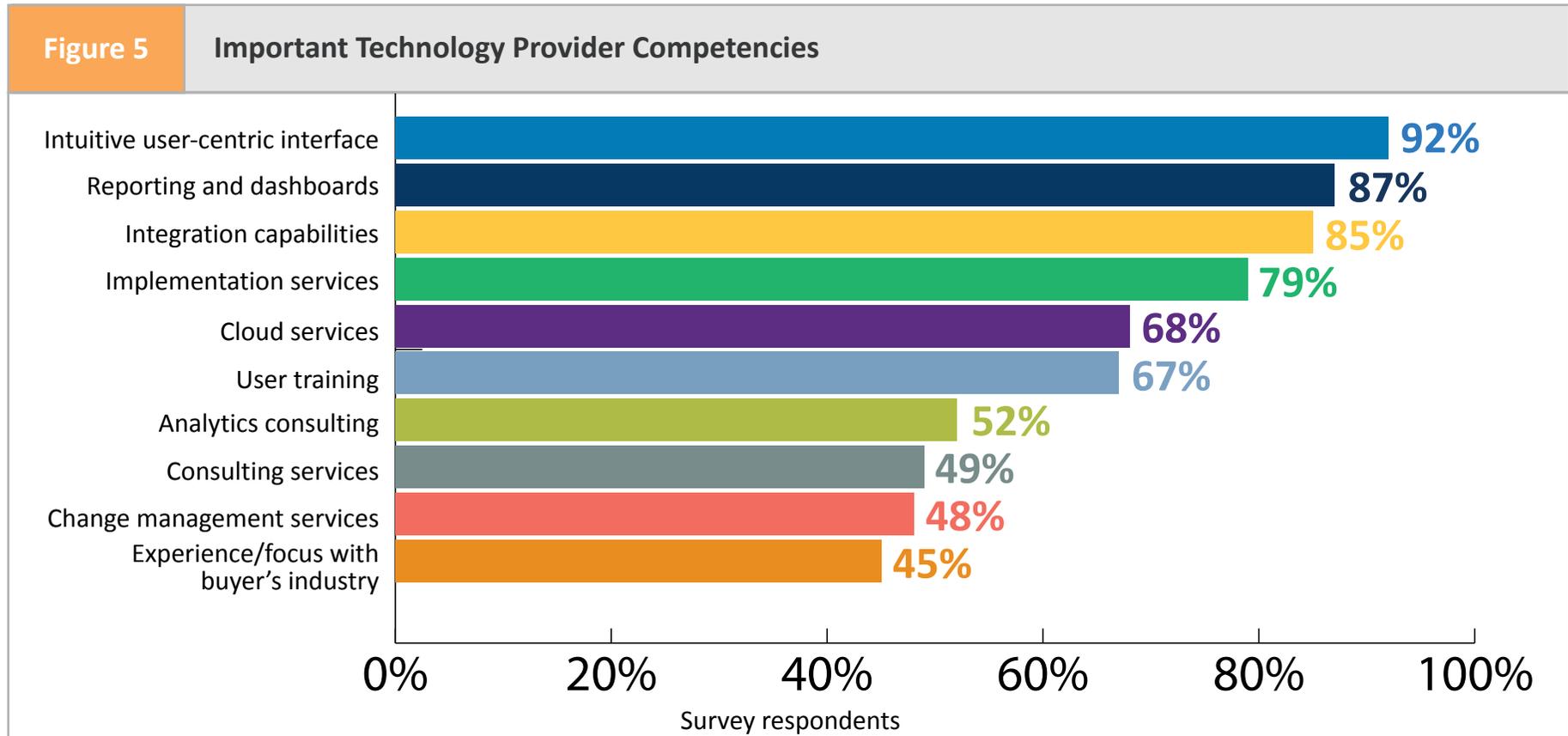
Figure 4

Top Barriers to Satisfaction with Technology



Source: 2017 Brandon Hall Group Learning Technology Study (n=290)

integration capabilities are either essential or critical.



Source: 2017 Brandon Hall Group Learning Technology Study (n=290)

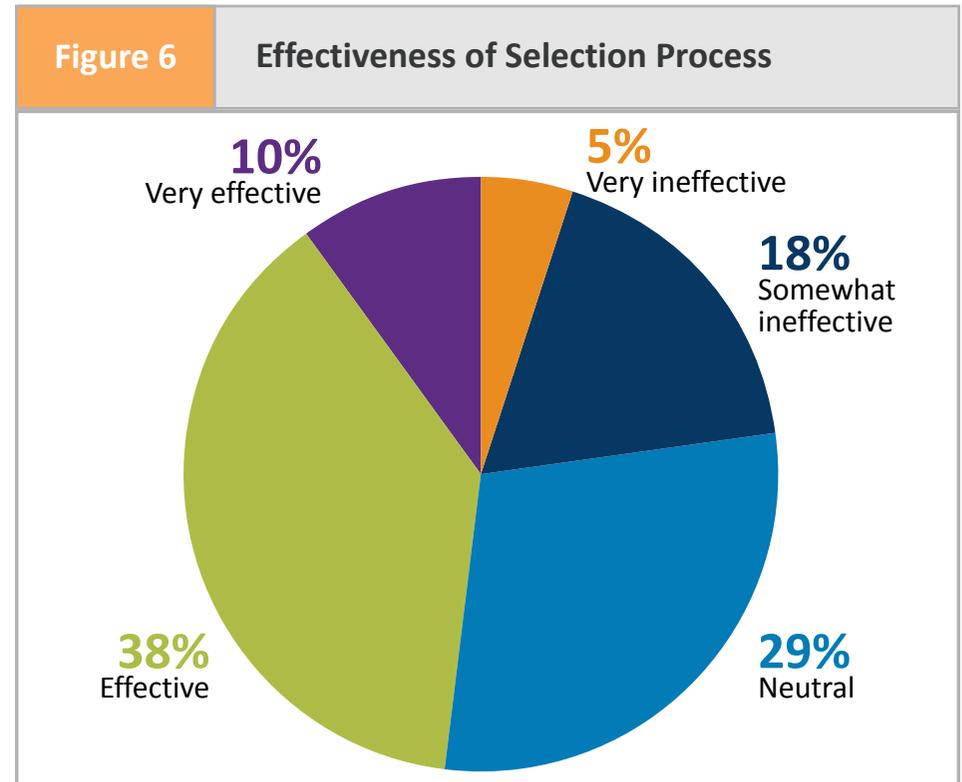
3. A Solid Selection Process is Critical to Success

When organizations give their learning technology poor satisfaction ratings, it can usually be tied back to the original selection process. Technologies that are chosen solely to solve immediate problems typically end up with shortcomings in the long run. Fewer than half of companies believe their learning technology selection process is effective.

Nearly one-quarter of companies say their process is outright ineffective, which highlights how much impact the process can have on satisfaction. To understand what leads to effectiveness, we looked at some differences between companies with effective selection processes and those without.

One-quarter of companies reporting a neutral, somewhat ineffective, or very ineffective process said they had no formal technology selection team. For those that said their selection process was somewhat or very ineffective, that number is 40%. The correlation becomes clear, then, that those companies without a formal selection team are 60% more likely to report an ineffective selection process.

There are organizations, however, that have a team, yet still report dissatisfaction with the process. This could be due in part to who is on the team. These companies typically had representatives from Learning, IT and HR on the team, but few had people from other parts of the business. For those companies with an effective process, Learning, IT, and HR were still the most likely



Source: 2017 Brandon Hall Group Learning Technology Study (n=290)

representatives, but we also saw more representation from business stakeholders and areas such as sales, finance, and the technology users themselves.

Probably most telling about the selection process are the lessons learned by organizations with an effective process and those without. The study asked what respondents would change about their most recent selection process. The top responses across the entire respondent pool were “develop a change management plan,” and “budget more time for implementation.”

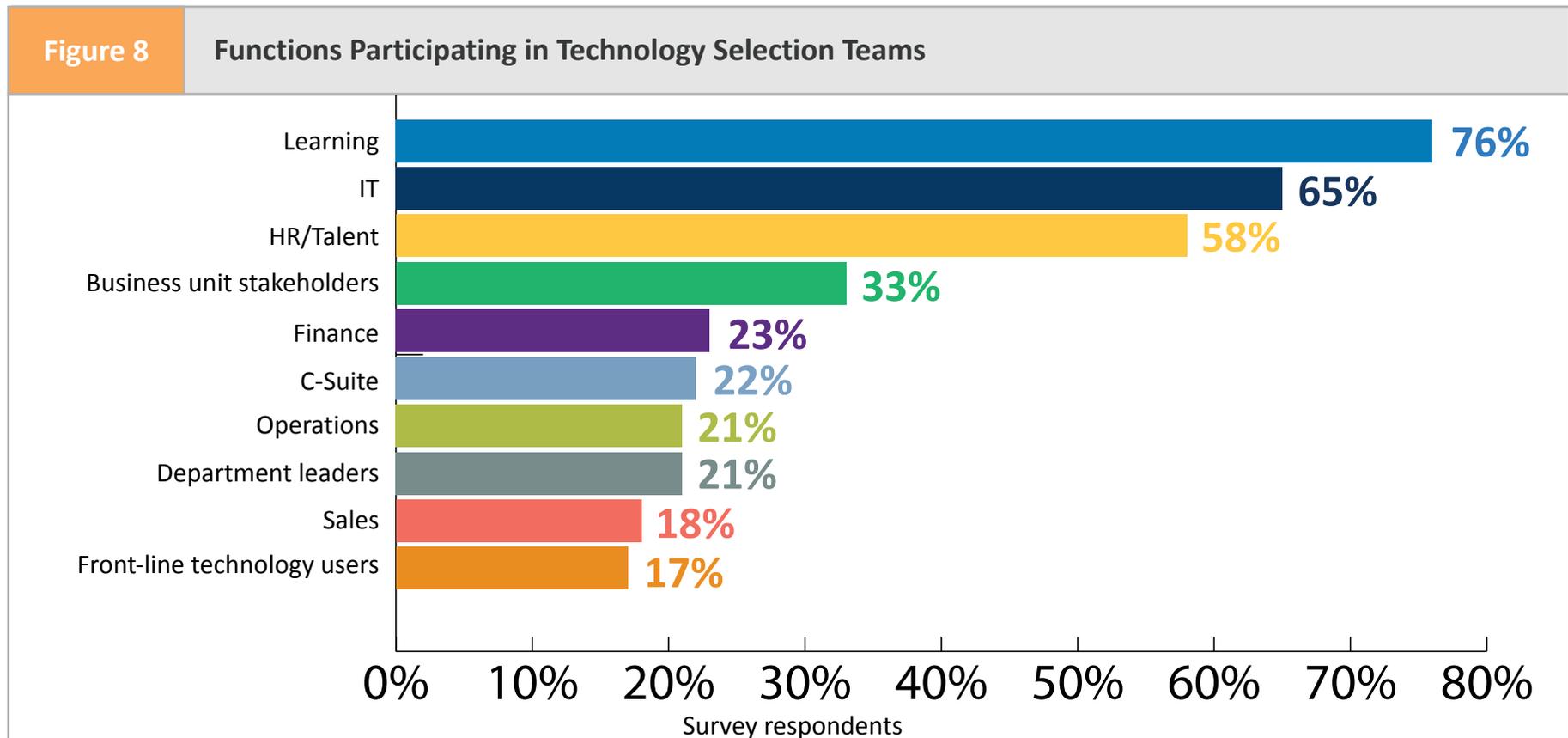
Figure 7 Technology Selection Lessons Learned	
Actions Organizations Wish They Had Taken	% of Organizations Responding
Develop a change management plan	34%
Budget more time for implementation	34%
Budget more time for training	31%
Evaluate more providers	30%
Budget more money for entire projects	29%
Budget more time for selection	20%
Hire a consultant or integration services provider for implementation	19%
Hire a consultant or advisor for selection	16%
Check more references	15%

Source: 2017 Brandon Hall Group Learning Technology Study (n=290)

Among respondents that reported an effective selection process, budgeting time for training is the #1 “lesson learned,” at 33%. It makes sense that the top lesson for this group would not necessarily be about selection, but rather focused on the rollout of the technology. For those with an ineffective selection process, 40% wish they had budgeted more money for the whole project, putting it at the top of the list. Poor selection processes can definitely lead to mismatched expectations and cost overruns.

4. Learning Technology Requires IT Resources

When asked about technology selection teams, 65% of companies with a dedicated team said that these teams include representatives from IT. That makes IT second only to the learning function for selection team participation.

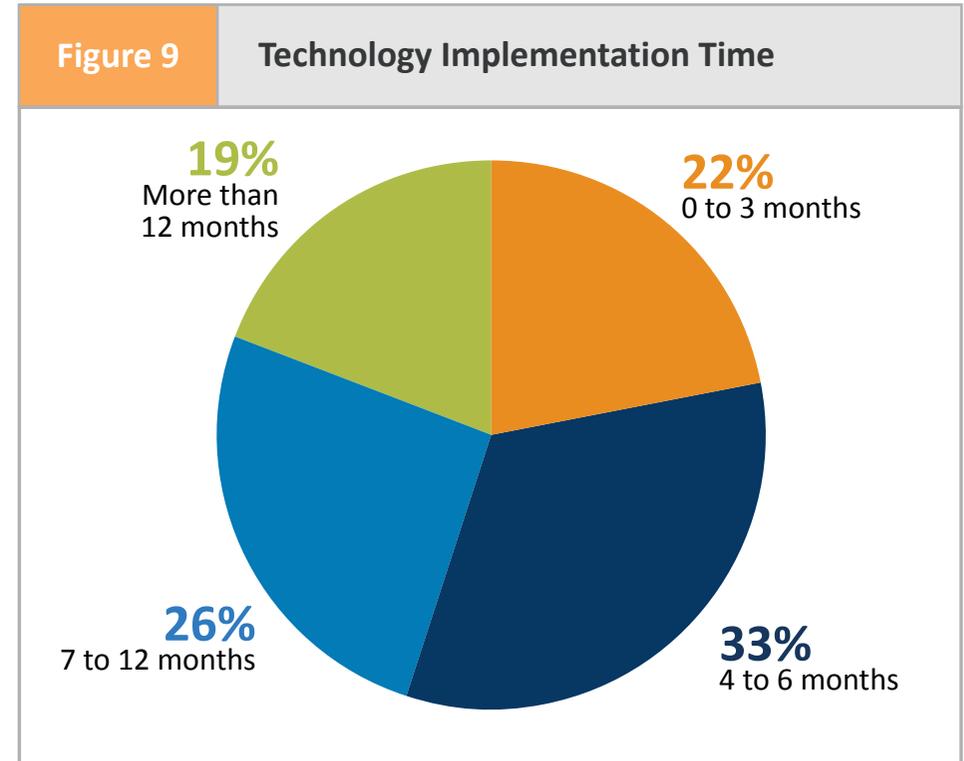


Source: 2017 Brandon Hall Group Learning Technology Study (n=290)

The presence of IT on these teams is essentially the same for companies with and without an effective selection process. However, we do see some differences in how involved IT is in the process. For companies with an ineffective process, 59% said that IT was either moderately or heavily involved in the process. For those with an effective process, 73% said IT had the same level of involvement. However, IT involvement had no effect on implementation time.

Key Takeaways

- Learning technology success is tied inextricably to planning.** Organizations at Levels 3 and 4 of the Maturity Model have better satisfaction ratings for all of their learning technologies than those companies at Levels 1 and 2. Also, 39% of companies at Levels 1 and 2 say their selection process is either effective or very effective. About 70% of companies with stronger strategies rate their processes that well.
- Focus on learners and the experience they will have using the technology.** All the features, functionality, and administrative capabilities in the world will not save a platform that users believe is out of date, hard to navigate, and simply difficult to use.
- Get IT on board.** On the one hand, it makes sense to look for solutions that do not require a lot of input and maintenance from IT. It can save a lot of money and resources in the long run. However, bring IT to the table to help identify solutions that fit that description. IT professionals will know best how much they will be relied upon. IT professionals are indispensable for the selection process, simply because they will know what questions to ask from an implementation and integration standpoint.



Source: 2017 Brandon Hall Group Learning Technology Study (n=290)

Brandon Hall Group's Research Methodology



About Brandon Hall Group

[Brandon Hall Group](#) is a HCM research and advisory services firm that provides insights around key performance areas, including Learning and Development, Talent Management, Leadership Development, Talent Acquisition, and HR/Workforce Management.

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