



2020 LEARNING TRENDS REPORT

TECH, TRENDS, PROBLEMS, AND SOLUTIONS: SORTING IT ALL OUT & ACTING ON WHAT MATTERS

WRITTEN BY

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INTRODUCTION

In the talent development, learning, and HR industries, we get bombarded by talk of learning trends that help produce solutions. These trends represent various tech and practices that are in varying stages of maturity from early hype to yesterday's stories. In truth, watching L&D trends take root and make an impact is a bit like watching oneself go from young adult to senior citizen. It's a decades-long process, and the year-to-year changes aren't drastic.

Case in point: Since 2012, we have been talking about xAPI, which can provide robust learner analytics. Eight years later and we're STILL mostly just talking about it. Few companies have implemented it on a wide scale.

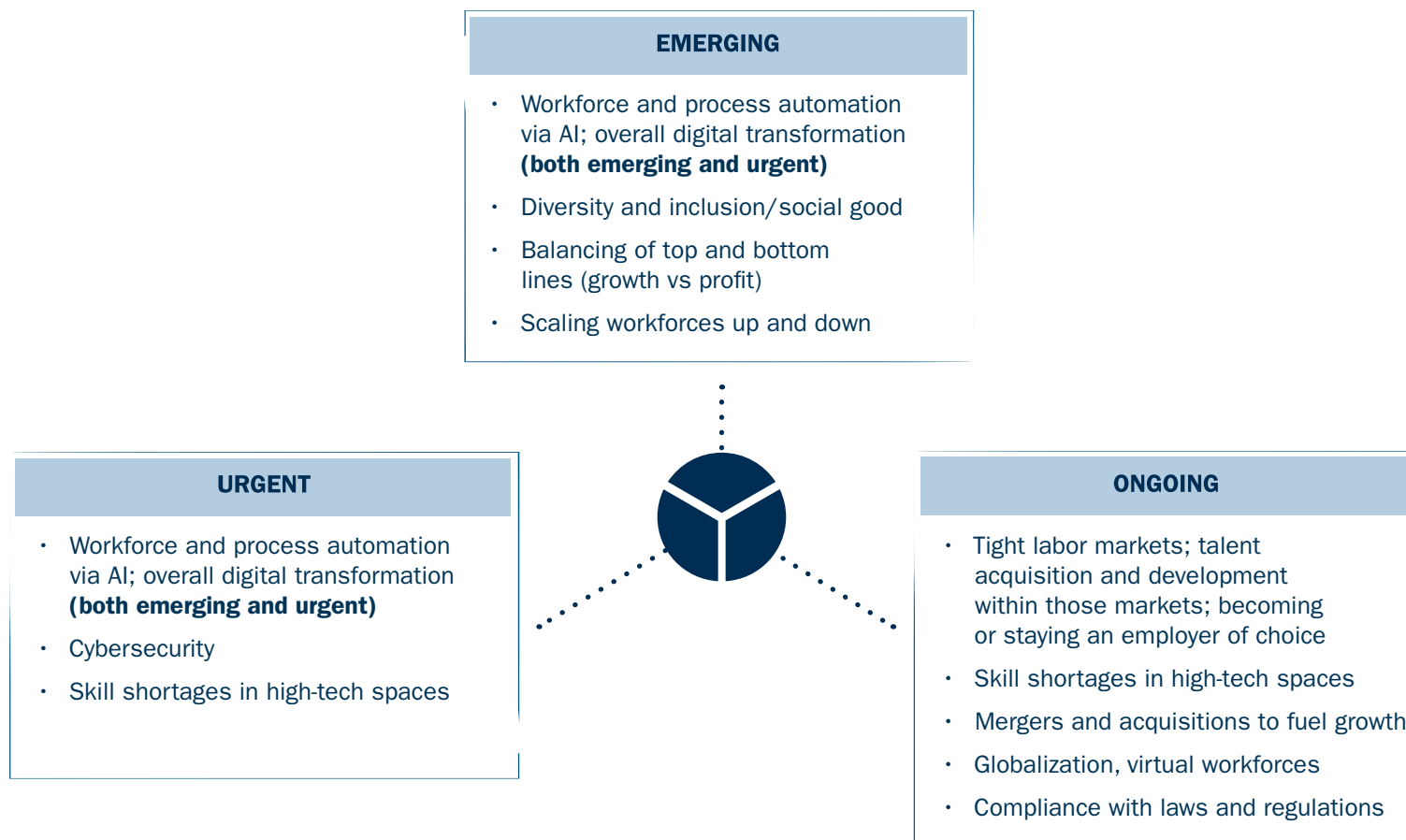
Instead, most companies that track learner data at all rely on the simple data available via SCORM 1.2 (launched in 2001) or SCORM 2004. Contrast that with the mobile phone industry where manufacturers are releasing new phone models two times/year.

Consequently, we want to do something different with this year's report. We'll still list the tech and trends that you likely are seeing "buzz" around at this year's conferences and in trade publications. We've even plotted them on the handy chart here, blending our own experience of these trends and technologies with analyses found in other publications. (ATD 2019, Gartner 2020, Taylor 2020).

Here's what our categories mean and the tech and trends associated with them:

HYPED OR HOT	WANNABE	IN	ENTRENCHED	HANGING ON
<p>People are talking about it and there's some evidence that folks are trying it out and having some success to share.</p> <ul style="list-style-type: none"> • Artificial intelligence • Blockchain technology • 5G • Learner analytics • Apps • Virtual assistants • Personalized learning • Virtual reality and augmented reality 	<p>Tools and tactics that people have been trying to make "in" for close to a decade or more, but significant uptake isn't really happening.</p> <ul style="list-style-type: none"> • xAPI 	<p>We've gone from hyped and hot to lots of people using it, talking about it, and sharing success.</p> <ul style="list-style-type: none"> • Just-in-time, bite-sized, moment of need microlearning • Video and visual 	<p>It's been around for at least a decade and is heavily used. There isn't always data to show it works, but it has a value that makes it persist (and the value may be, "We know how to make it.")</p> <ul style="list-style-type: none"> • SCORM 1.2 • Completion data • Text-heavy • "Traditional" eLearning 	<p>It's been entrenched for a long while, has started to fall out of favor, but persists for specific use cases.</p> <ul style="list-style-type: none"> • SCORM 1.2 • Completion data • Formal programs • Text-heavy • "Traditional" eLearning

This year we want to encourage L&D people to get **beyond the solution space** and focus time considering the problems organizations need to solve. C-suite leaders are not talking about VR, AR, or other learning trends. Instead their primary concerns are these issues, some of which are both emerging AND urgent (Fortune, 2019, Forbes 2019).



Your value as an HR or L&D professional is rooted in how well you see the overlap between the problems your organization is trying to resolve and the solutions you can offer. So, this year's report—our fifth one—goes beyond sharing learning trends data as it has in the past by also exploring this overlap between problems and solutions. It encourages you to consider your organization's challenges and strategies as the lens by which you evaluate the value and need for emerging solutions, such as AR, VR, or personalized learning fueled by AI.

Within these pages, we share the findings from our annual survey; we analyze findings and identify themes based on multiple years' worth of data; and we articulate a process you can consider using within your function to help monitor learning trends and figure out what to investigate and what to simply continue watching.

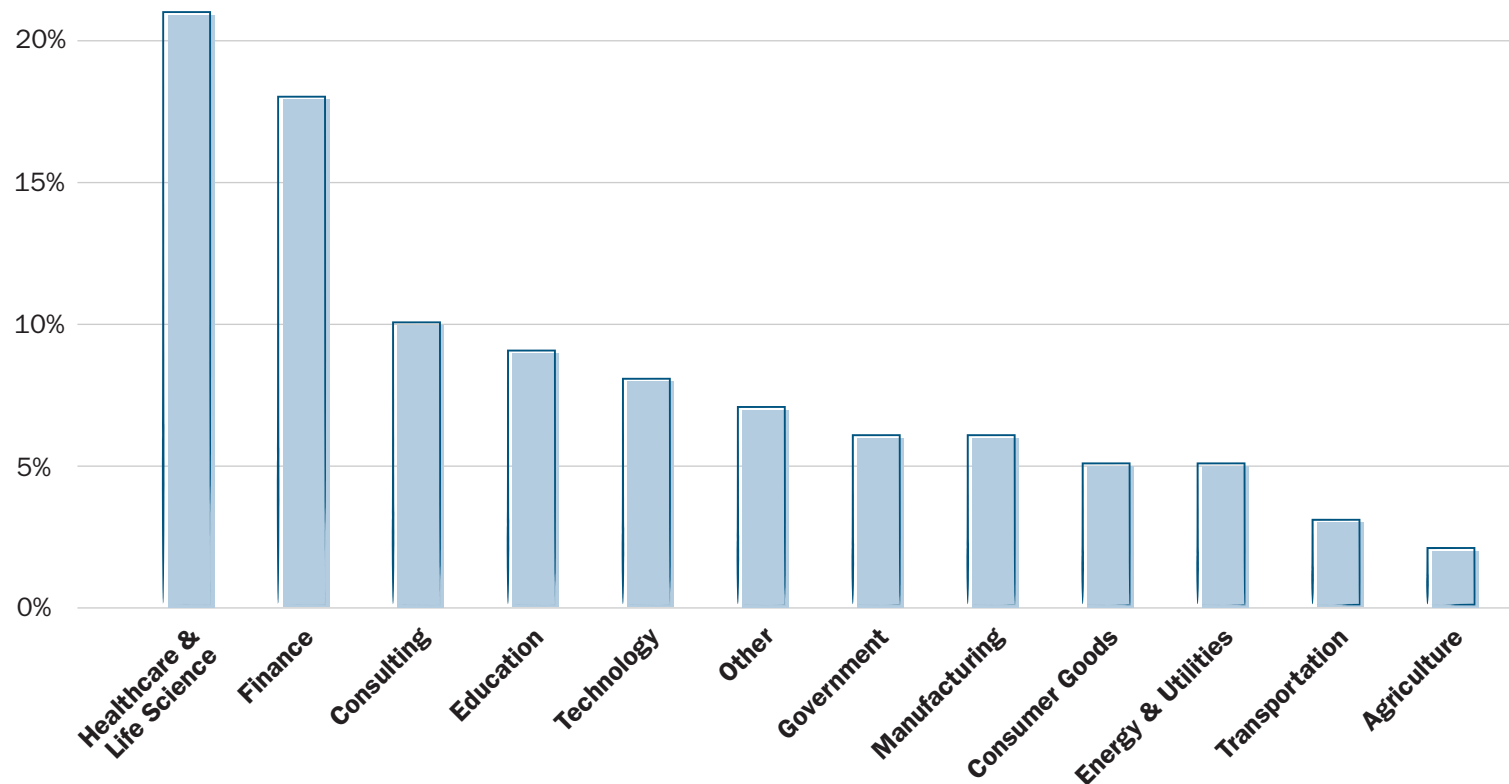
ABOUT THIS REPORT

THIS REPORT IS BASED ON A SURVEY WE DISTRIBUTE ANNUALLY.

In addition to the 10 questions we've asked in previous years, we added 5 questions to this year's survey. These questions relate to how well L&D professionals are partnering with the business and aligning solutions to the business's strategy.

While we strongly encourage practitioners to review a variety of sources such as those published by ATD and eLearning Guild, Fortune, Forbes, and others, we've endeavored to do some of the research for you and provide insights gleaned from the research and the data from the survey.

As the chart shows, people from a wide array of industries responded to our report:

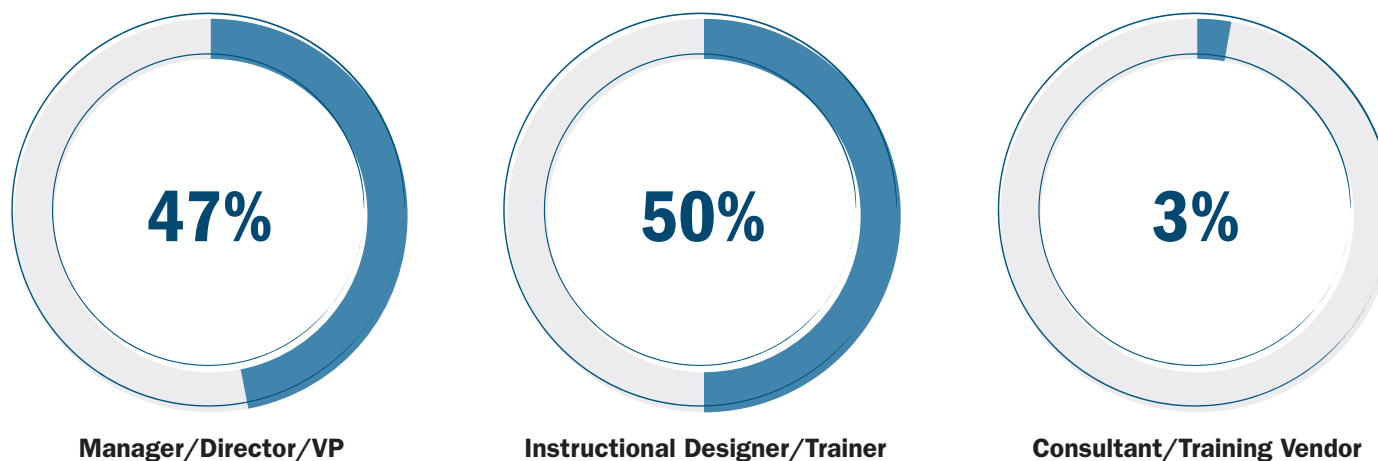


To gather our data, we sent a 15-question survey to TiER1 clients and other learning professionals who subscribe to our newsletter. We also posted a link to the survey on LinkedIn and Twitter. The survey was open from 12/4/2019 to 1/10/2020 and had 131 responses.

When appropriate, we compared the results to our 2016-2019 reports. (Prior reports were published by Bottom-Line Performance, Inc, which was acquired by TiER1 Performance in August 2019.)

While some survey questions were open-ended, most were “select all that apply.” For any open-ended questions, we took the raw responses and put them into meaningful categories that emerged based on the responses given. For example, if respondents said both “stakeholders” and “lack of time for training” were holding them back, we counted this as one response in each category.

WHO RESPONDED?



More than 47% of respondents are at the manager, director, or VP level in their organization, and most are in roles directly related to training, talent, or learning. Nearly 50% of respondents are instructional designers or trainers. The remainder of respondents consider themselves consultants or external training vendors. This represents an 11% increase in manager/director/VP respondents over last year with corresponding decreases in the percentage of ID/trainer roles and consultant roles responding.

FINDINGS SUMMARY

RESPONSES TO 15 QUESTIONS YIELDED INSIGHTS THAT WE CLUSTERED INTO FOUR THEMES.



First, L&D leaders are working hard to include key stakeholders in the design and development of content, and this approach is working. This collaboration is helping to align organizational priorities and learner needs and is driving the desire to create a stronger culture of learning.



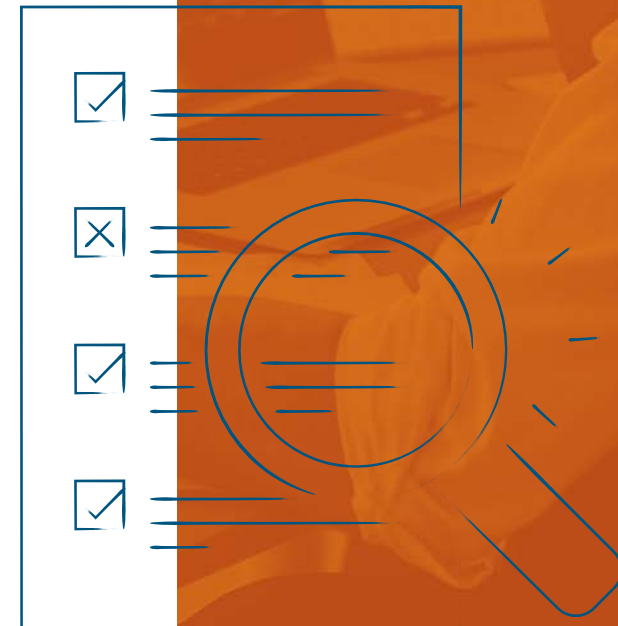
Second, skill development is viewed as both a challenge and an opportunity. The pace of digital transformation and generational shifts in the workforce is forcing employees to reskill more often and at a faster pace. In response, learning leaders are opening their minds to nontraditional solutions.



Third, emerging technologies (AR, VR, adaptive learning) are challenging the Big 4 (ILT, VILT, eLearning, Video) but may never scale or move beyond being a shiny object that distracts from tried-and-trusted methods. Podcasts (which are not new) are making their way into the list of what folks are excited about for 2020. From a contemporary perspective, they are technologically low brow; anyone with a smartphone and an opinion can create a podcast. Why are they on the list? Because they are effective, available at the point of need, and already part of many learners' daily lives.



The final and most significant theme is an overall lack of time. This challenge creeps into every aspect of professional learning, including the design and development process, topics covered, and modalities used to deliver the content. It is a major paradox: organizations and employees need well-designed training, but they don't have time to create it, consume it, or maintain it.



DETAILED FINDINGS & CONCLUSIONS



AUDIENCE

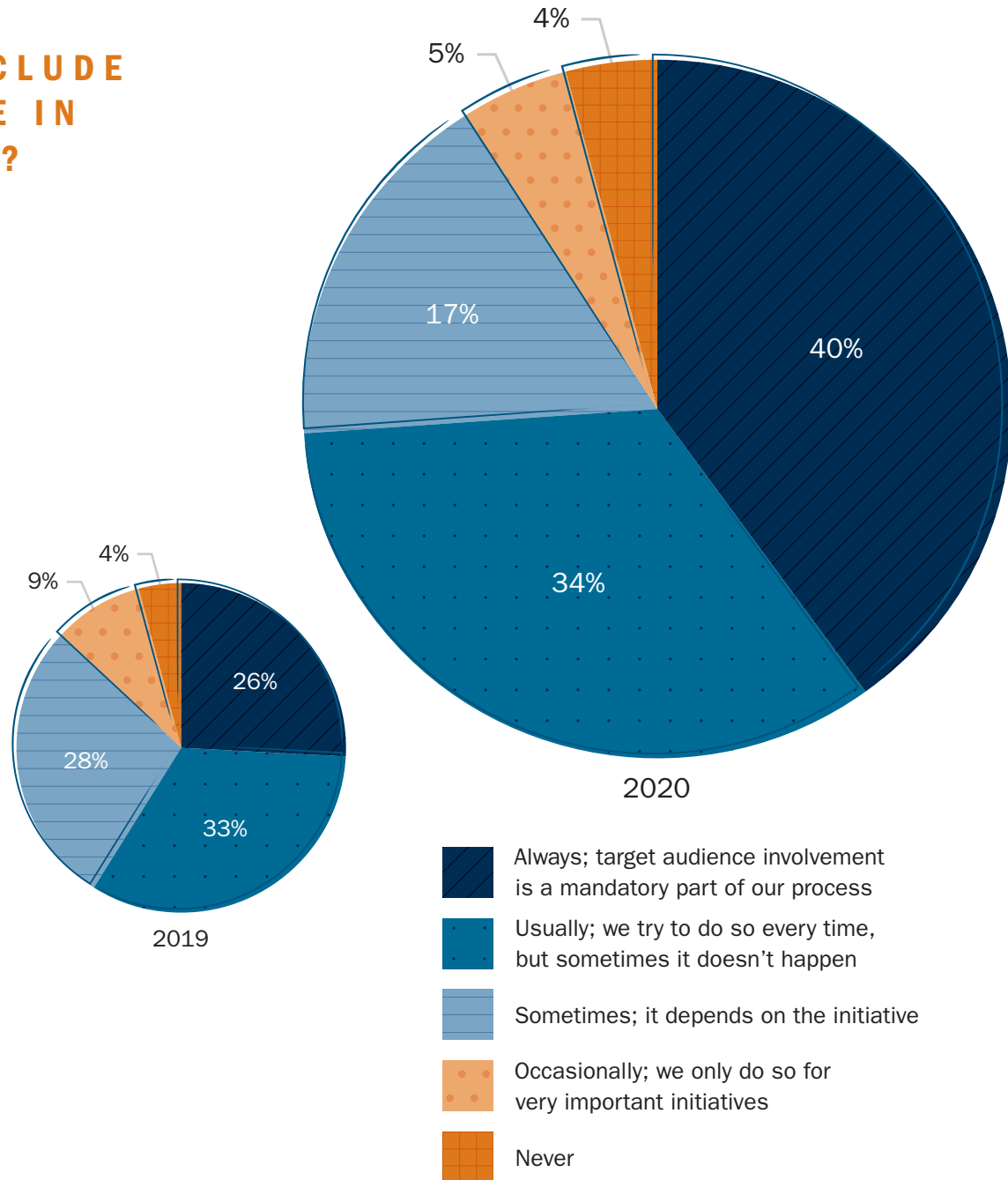
HOW OFTEN DO YOU INCLUDE YOUR TARGET AUDIENCE IN YOUR DESIGN PROCESS?

Last year we wrote, “As design thinking continues making its way into the instructional design space, we expect the level of target learner involvement to increase. Organizations recognize that as user experience (UX) design dominates on the consumer side, learning experience (LX) design needs more thought.”

And guess what?

This year’s data reflects a 14% increase in the percentage of respondents who say they “always” include target audience involvement as part of the training design process. The percentage of those who sometimes to occasionally do so dropped by a corresponding number of percentage points. While we hope we were accurate in our 2019 predictions, the change in the profiles of our survey respondents may be confounding our results. The number of respondents whose job titles are manager, director, or VP level increased by 11%. Are learners truly getting more involved, or is there simply a varied perception of how involved they are based on role?

Our conclusion from last year still stands: the continued inclusion of learner input is a positive sign that L&D organizations see the value of individualizing and meeting the needs of its audience rather than prescribing learning outcomes and paths.

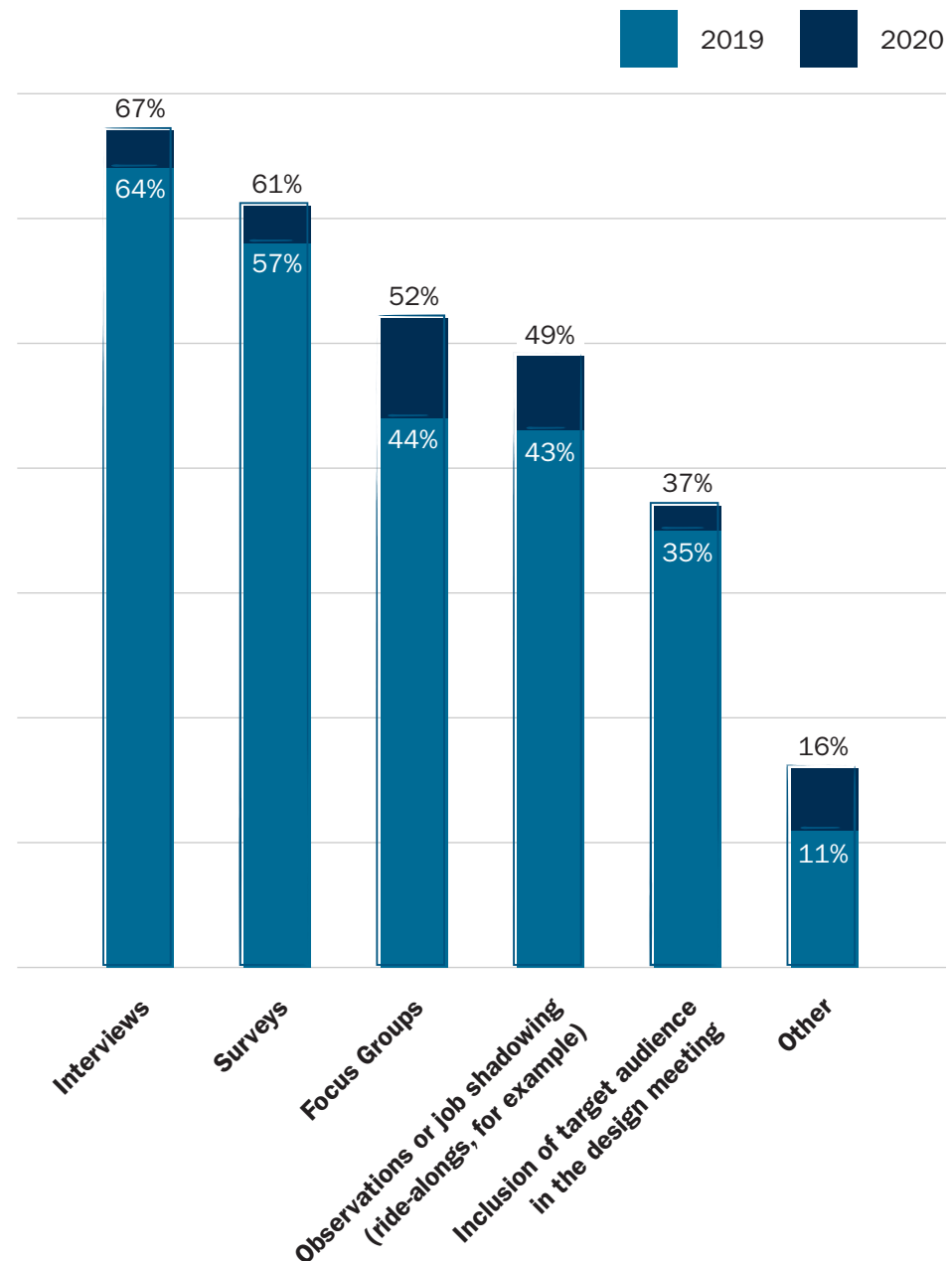


WHEN YOU INCLUDE YOUR TARGET AUDIENCE IN THE TRAINING DESIGN PROCESS, WHICH OF THE FOLLOWING METHODS DO YOU USE?

We first asked this question on last year's survey. When we compared results to 2020, we noted steady usage in the use of interviews and surveys but an increase in the use of focus groups (up 7%). Within the "other" category, we were encouraged to see references to design thinking tactics such as user experience mapping, creation of personas, and human-centered design sessions. These responses are new for this year. Last year's responses focused on how respondents got information about target learners and this year's is consistent. We're still seeing that target learners' involvement in design meetings only happens about a third of the time.

Given answers to later questions, we hypothesize that L&D groups have found a balance between the time it takes to get valid input and feedback versus the deadline to create the training. Everyone—creators and learners alike—are competing against time shortages. We may be seeing inclusion rates that are about as good as can be achieved. Inclusion may be limited to those programs perceived as most "strategy critical."

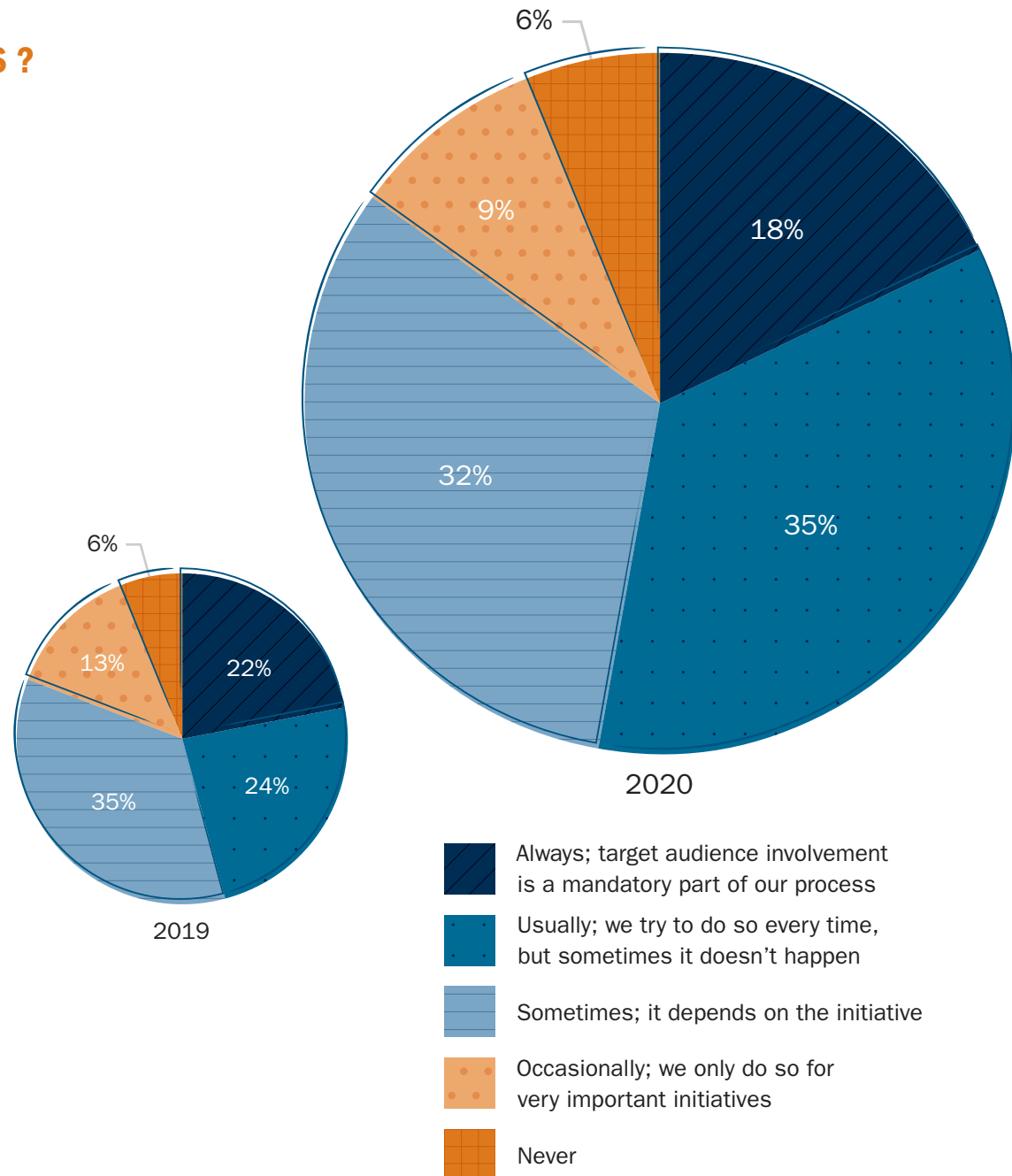
Opportunity may still exist for training functions to test prototypes on actual target learners; something that can occur within the confines of a design meeting. This early input can be a difference-maker in the adoption of the learning solution. It can also be done efficiently.



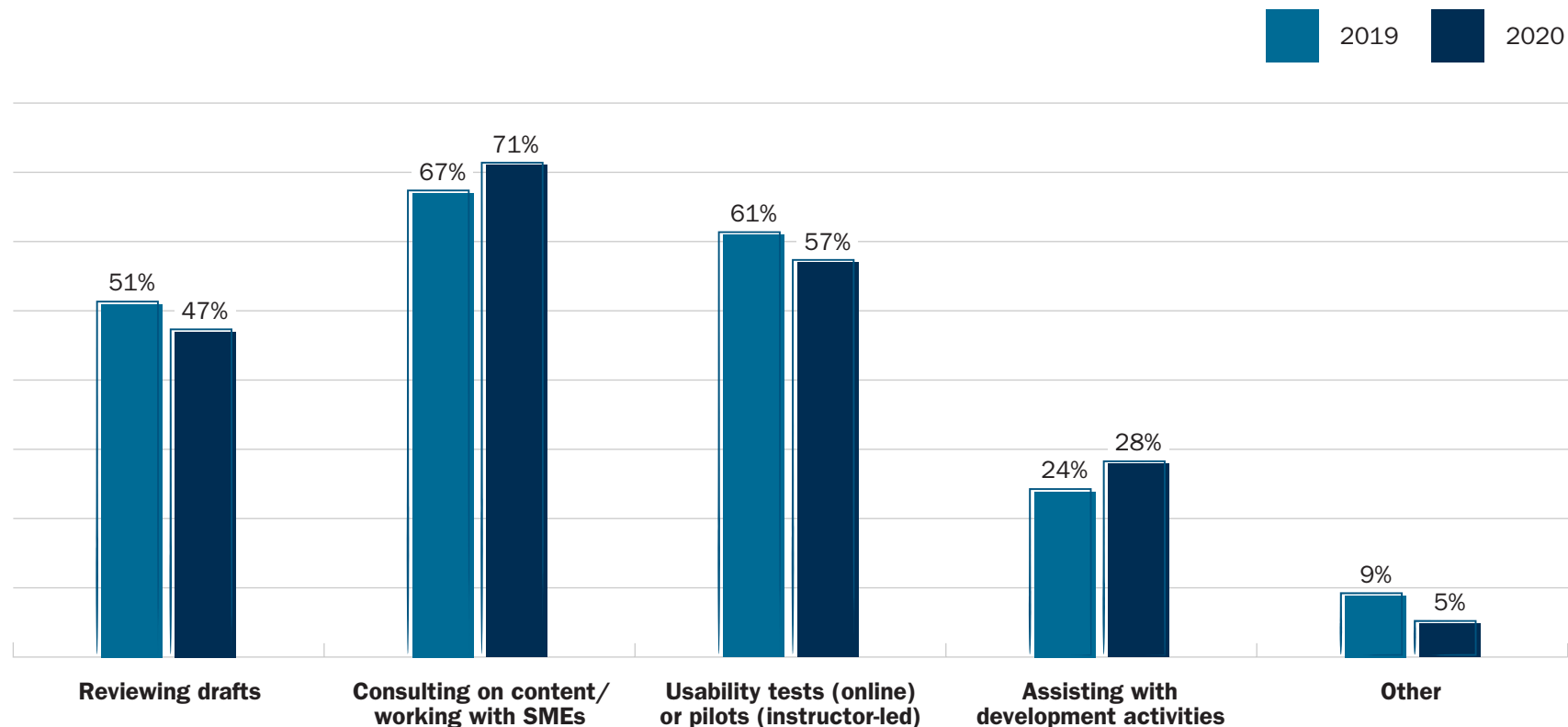
HOW OFTEN DO YOU INCLUDE YOUR TARGET AUDIENCE IN YOUR DEVELOPMENT PROCESS?

These results reflect improvement over 2019. The combined percentage of those who always or usually include learners in development is 53% in 2020 compared to 46% in 2019. This uptick supports our comments from 2019 where we noted that the shift to more online solutions such as portals and apps benefits greatly from target audience input to ensure optimal usability.

This increase in learner involvement likely comes from solutions labeled “business critical” versus those labeled “for compliance purposes.” The skeptical reviewer might want to question whether this year’s changed respondent demographics (i.e., different job levels) produced the more optimistic responses.



WHEN YOU INCLUDE YOUR TARGET AUDIENCE IN THE TRAINING DEVELOPMENT PROCESS, WHICH OF THE FOLLOWING ACTIVITIES DO THEY PARTICIPATE IN?



The results for 2020 did not vary significantly from 2019's data. Learners are included sometimes, and other times not. Pilots or usability testing with users remains an opportunity area. Including user input during this process is a simple and effective way to connect with your audience as you seek to understand what they truly value and how they want to consume content. Failing to pilot before large-scale rollout is a bit like buying new wall paint without doing any test swatches. Better to

paint that six-inch square and see what you think before investing in the gallons of paint and hours of time only to discover the color isn't what you wanted. If the only outcome you're seeking is verification of completion, testing may not matter. **If you're looking for business outcomes, failing to pilot or do usability testing is a major risk.**

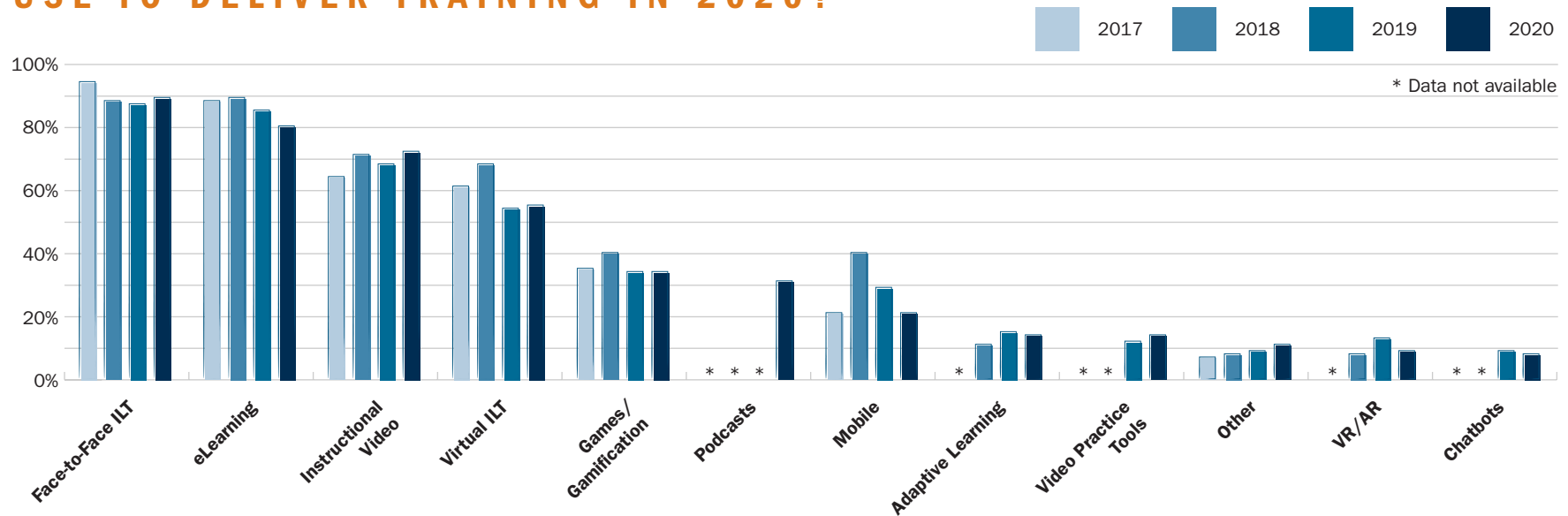
In the same way that customer experience (CX) is rapidly trending upward into the minds of marketers, so will the idea of learner experience (LX) for L&D

practitioners. This increased focus may reveal itself in the form of LX based on technology's ability to slice learner groups into smaller subsets and determine what content is needed to meet the needs of those subsets.

In 2020 we predict that we will see an increased appreciation of the entire LX journey.

MODALITIES & TOOLS

WHAT METHODS WILL YOU OR YOUR ORGANIZATION USE TO DELIVER TRAINING IN 2020?



This year, podcasts have come bursting onto the scene, with a whopping 31% of respondents saying they will use them in 2020. The other intriguing item to note is the decline in mobile. It peaked in 2018 with close to 40% of respondents saying they would use it. This year only 21% plan to use it, a significant decline over two years' time. It may reflect the "niche" use case for mobile; it remains a highly appealing option for certain learner populations but not an optimal or realistic distribution method for all learners. The complexities of maintaining mobile apps may push their usage downward. Programming skills are often required to maintain mobile solutions, something many L&D functions lack and IT functions carefully protect. Another factor could be the challenge

of creating compelling and meaningful content. It's one thing to have an app, but it's another to have an app that offers high quality content that is updated with a frequency that maintains users' attention over time.

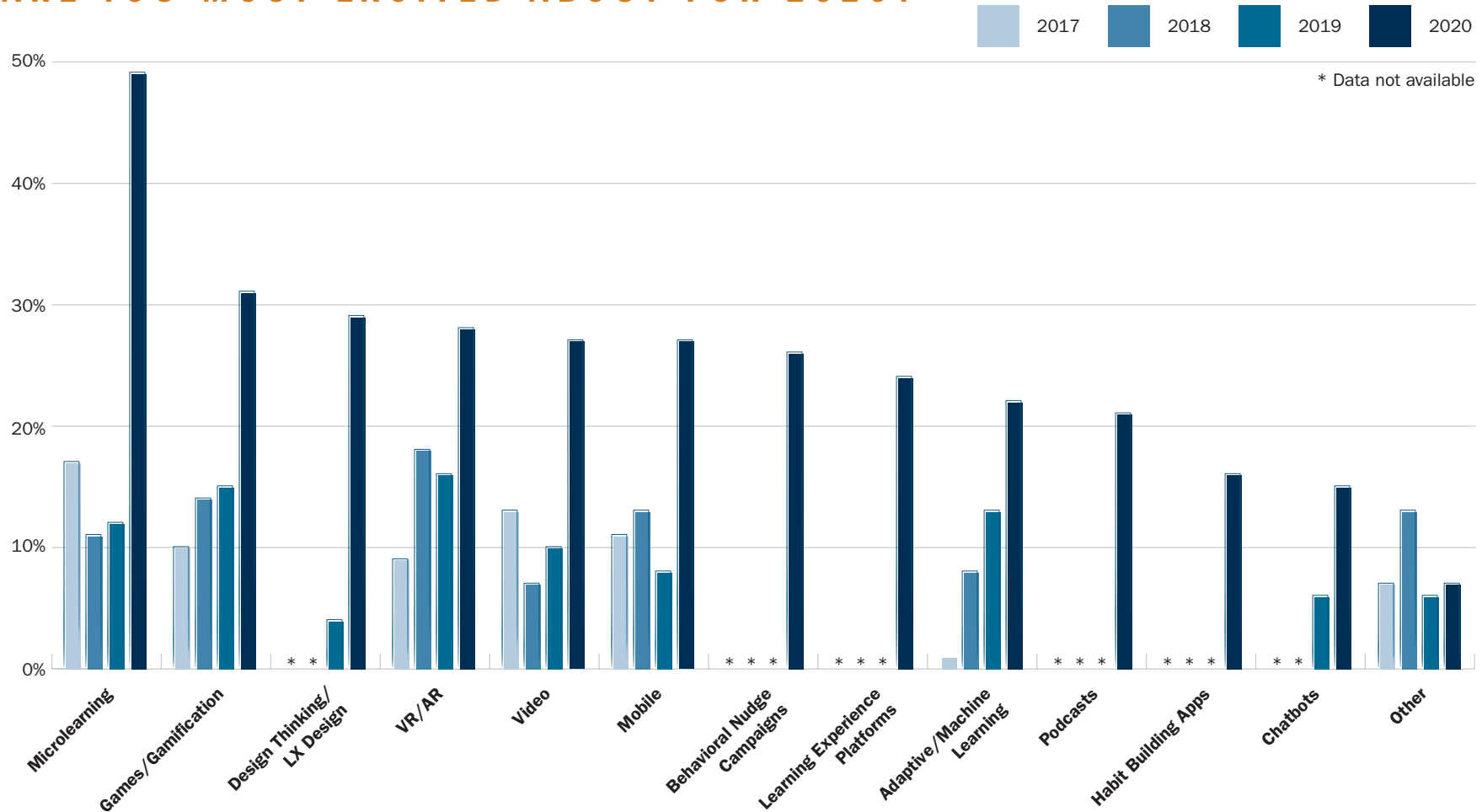
The big constants across four years of data are ILT, eLearning, video, and virtual ILT. The Big 4 delivery methods remain dominant with newer emerging technologies dwarfed by them and barely rising above 10% of usage. We consider this a major theme: **tried and trusted is tough to topple**. "New" has a tough time competing against known even when little evidence exists to show efficacy of the tried and trusted. Relative low cost and ease of deployment are likely factors in this persistent usage. Rolling

out a virtual reality experience or mobile app is far harder for many organizations than uploading a Storyline course to an LMS or hosting a live workshop or webinar.

In the "other" category, respondents listed things such as microlearning (which likely fits into eLearning category), as well as books, articles, and subscription-based services such as LinkedIn or Gartner.

The larger question is likely how effective all these solutions are at supporting strategy activation. **What are organizations doing to map their solution choices to how well those solutions solve problems and have a positive organizational impact?**

WHAT LEARNING TREND(S) OR DELIVERY METHOD(S) ARE YOU MOST EXCITED ABOUT FOR 2020?



From the previous question, we already know the Big 4 of ILT, VILT, eLearning, and video are the dominant distribution choices for training. This question probes for specific new trends that excite people. Microlearning dominates with almost 49% of respondents expressing enthusiasm for it. eLearning and video made it onto this list as well, which is intriguing given that neither is tech. More interesting, based

on responses over several years 3 new categories have emerged: behavioral nudge campaigns, habit-building apps, and learning experience platforms.

Our conclusion from these results is that practitioners are interested in alternative ways of reaching and engaging learners and driving performance support and development solutions

that meet people where they are **in the flow of the work**. These approaches, however, will be niche uses for very specific problems.

Let's look at a few of the newcomers as well as trends that made significant gains, and how we see them being used.

SOME OBSERVATIONS AND EXAMPLES

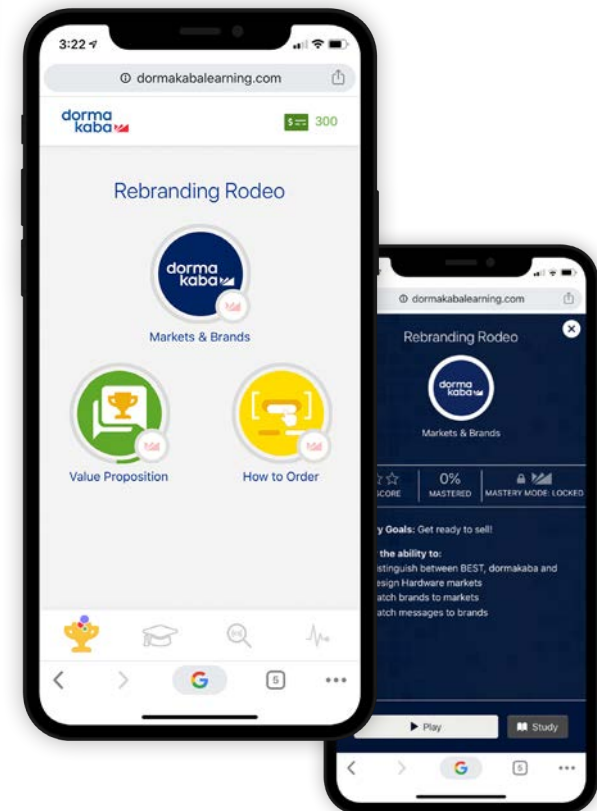
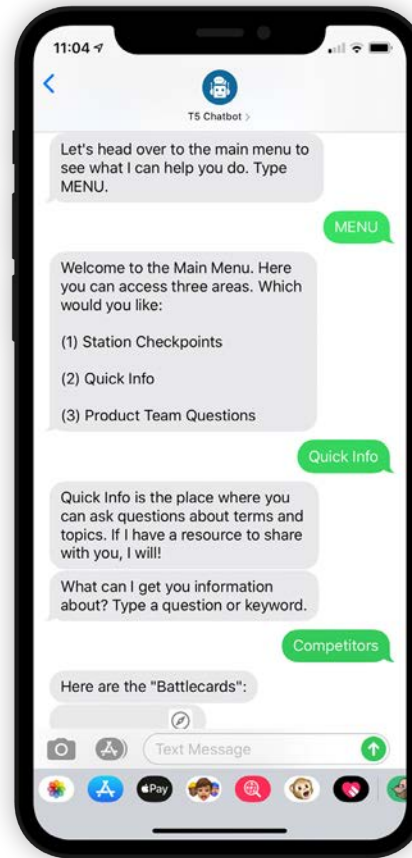
Microlearning

As you'll discover later in this report, a lack of time is the unchanging major challenge faced by creators and consumers of training alike.

On the learner side, the issue is having enough time to consume content and get formal training on skills. It's probably no surprise then that microlearning, a totally un-new concept, has become "In" over the past 3 years (based on survey responses). We believe this is in response to the rapidly escalating issue of time. This approach to content packaging **meets learners where they are** (working with little time available for extensive formal training) and gives them small chunks of content to consume when it is "convenient" for the learner. Convenient is in quotes because it sometimes means when a learner can find a free 5 minutes that might be squeezed in while commuting to or from work, in between meetings, or while waiting on a child who is at soccer practice.

Microlearning can take many forms: a mobile game, a video, a podcast, or a chatbot exchange. Microlearning is at its best when served up as a quick reinforcement of skills previously learned or as a set of micro lessons that all roll up to help someone achieve a major learning objective. A 3- or 5-minute video or podcast can support someone to recall a formal lesson from a week or month previously. It can also be the "just-in-time" how-to that walks someone through a task they only perform occasionally. Finally, it can be the small piece leading up to a good understanding of a large body of information.

While we're fans of the concept—and we've designed numerous microlearning solutions—we're also waving a yellow caution flag. Some learning goals lend themselves well to microlearning approaches; others do not. When microlearning is used, it's not enough to simply break a lesson into small parts. Each piece must be well designed to ensure it is relevant and engaging to learners. **Smaller doesn't always mean better. Sometimes it just means smaller.**



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augmented reality



Mauris ut justo tempus, eleifend ex sed, lobortis eros. Nunc vulputate eleifend nisl. Nam vulputate lacus et eleifend cursus. Vestibulum porta efficitur viverra.

When ready to begin, tap NEXT.

NEXT

Augmented Reality and Virtual Reality

Despite the expense and challenges of these two delivery methods, tremendous excitement exists around AR, VR, and the “difference” factor these technologies offer. The idea of immersing someone in the moment holds vast appeal, particularly when **learning science shows that environment impacts how well we learn**. If you want someone to pass a test, put them in a classroom, teach them content, and then have them recall that content in the same classroom. If you want someone to learn how to drive a car or fly a plane, put them in it, and have them do it.

AR and VR have the potential to cultivate empathy and understanding. If you want someone to see the world or a situation from another point of view, put them into the scene or another person’s shoes. Let them see and hear things as though they were there.

These technologies can be expensive to produce and challenging to scale, but they can have a major impact on attitudes. The benefits, therefore, can be big. Why?

Because our experiences influence our mindset. Our mindset influences our behavior. And our behavior influences our results—and the results of the organizations we work for.

A standard ILT or eLearning course may be cheaper to produce but more expensive in the long run because it yields no behavior change. AR/VR tantalize with their possibilities of adjusting mindsets or offering real-world simulations that speed up time to competence. Our perspective is that AR/VR will have their place, but what that exact place will be is still emerging. Right now, there is a lot of glitz with little behind it yet. The true best uses are likely undiscovered. The dollar investment needs to match to the scale of the need. Our prediction: the best uses may not end up being simulated activities but rather simulated environments that enable people to connect to each other or augment their view of a real-world setting.

Podcasts

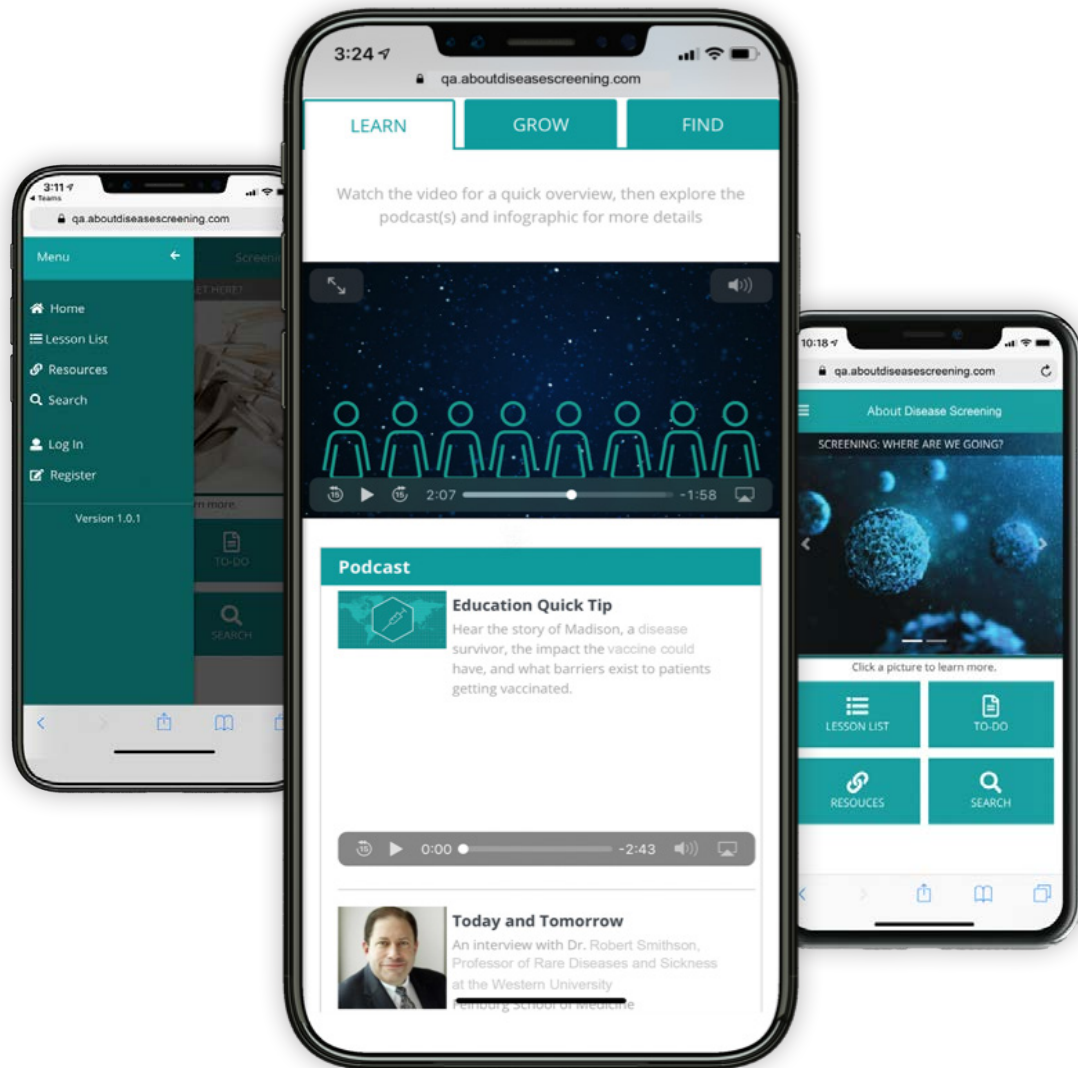
Today's workers get stretched – and then stretched some more. They are trying to do and learn all at the same time. They are increasingly mobile and often work remotely. They may face long commutes or no commute at all, potentially using “commute time” as treadmill time.

Podcasts have exploded in the past few years, fueled partly by the extreme popularity of a few early entrants into the space such as WBEZ's (NPR) wildly popular *Serial*.

L&D practitioners have noted the trend and started producing talk-show styled podcasts that inform and engage. Computer software replaces sound studios and puts podcasting within reach of many. Busy workers appreciate the ability to listen while they drive, walk, or work out. Even better, podcasts can be combined and bundled with other tools, offering learners choice: read, watch, or listen.

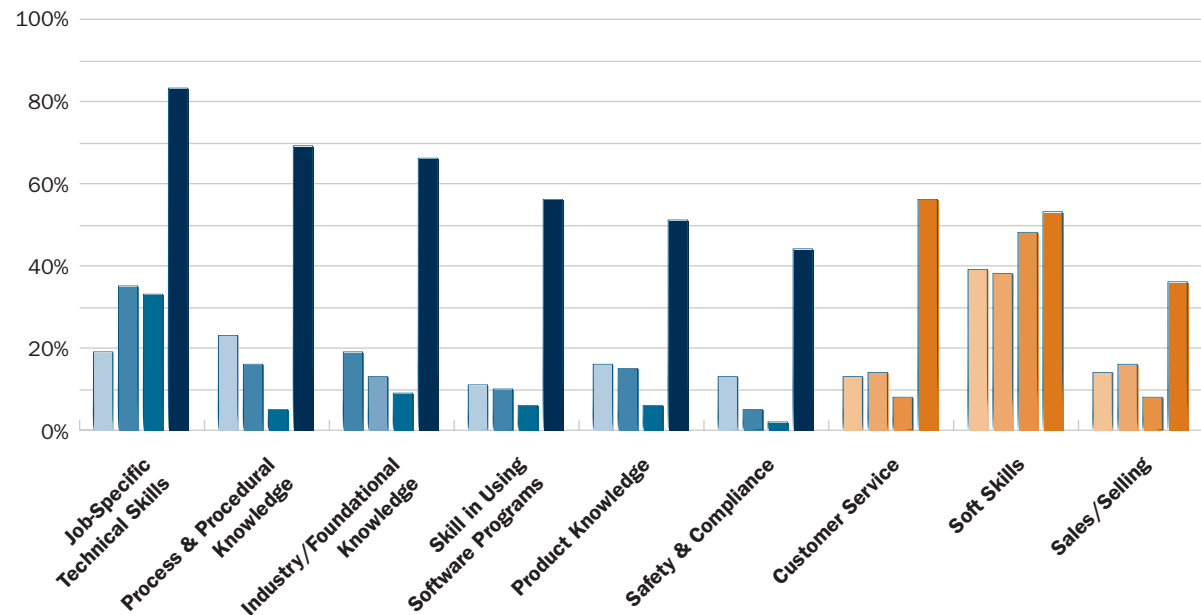
But beware, just because you can doesn't mean you should. If the content is boring, they will not consume. Our research reveals apps aplenty that make it very easy to produce and distribute a podcast. Those same apps do not make it easy for someone to write and produce a good podcast. People were attracted to *Serial* because it was mesmerizing to listen to. Its producer, Sarah Koenig, created an engaging pace and interspersed her own voice with interviews of others to craft a compelling story. That's far different than Sam in HR recording 15 minutes of himself reading a script on new HR policies.

For those who want to venture into podcasting, expect a steep learning curve before you start creating good podcasts that draw in and engage your audience.



SKILLS & CHALLENGES

WHAT KNOWLEDGE AND/OR SKILLS ARE NEED-TO-HAVES FOR YOUR TARGET AUDIENCE TO BE SUCCESSFUL IN THEIR JOBS?



The landscape changed significantly over the course of a year on these responses. We speculate that the change in the job level of respondents may have contributed to the dramatic changes. The biggest shift was in technical/job specific skills, which more than doubled in the percentage of respondents who deemed it a “need to have” for learners to succeed. Industry/foundation skills also took a huge leap up, jumping from less than 10% to 66% saying it was a must-have. Customer service skills also increased dramatically in terms of need, going from about 8% to 56% of respondents rating it as a need.

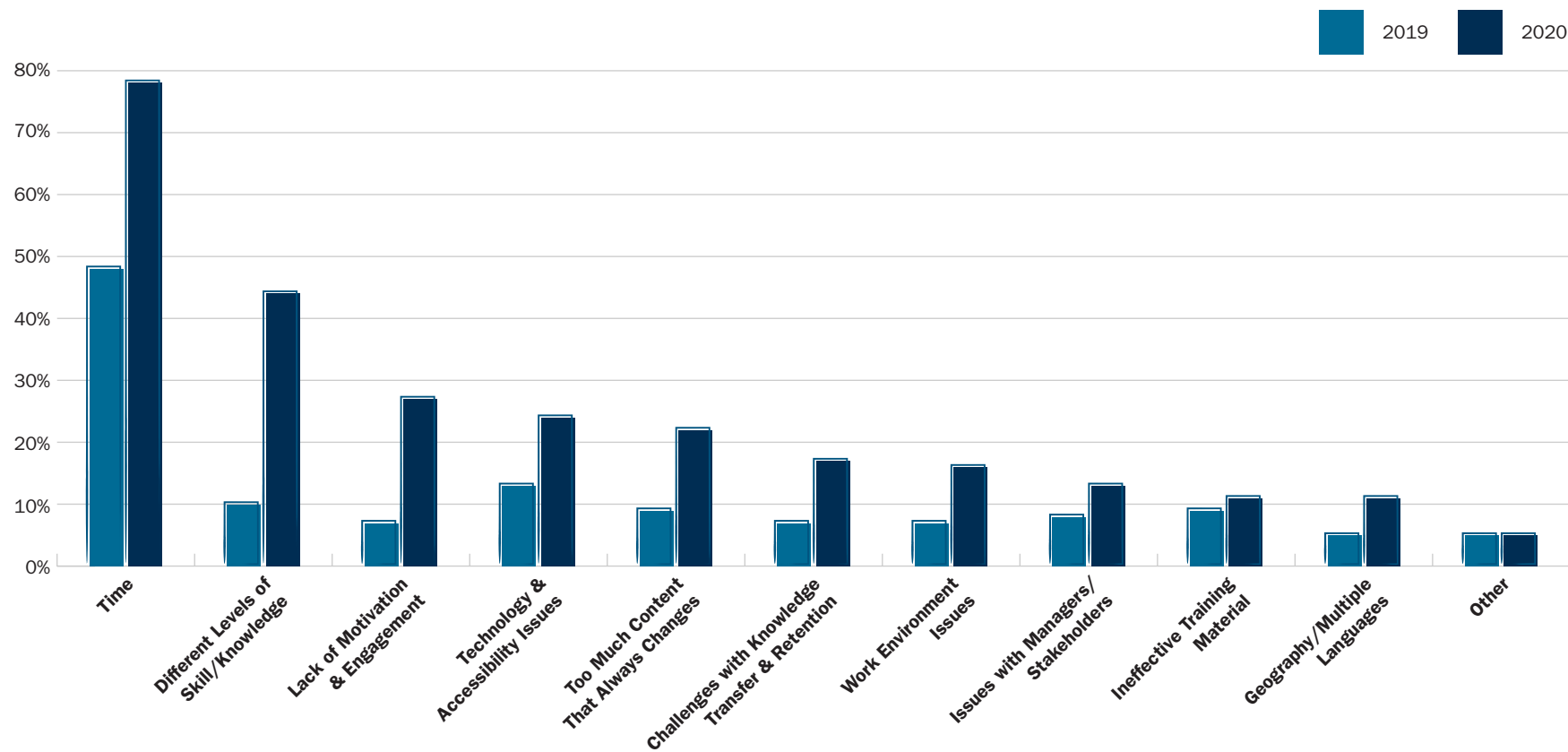
In general, all skills jumped dramatically higher over last year. Both soft and technical skills experienced sharp spikes in ratings. In the “other” category, leadership skills were repeatedly mentioned.

The ratings depend on where the organizations respondents come from. The top sectors contributing to our results were healthcare, followed by finance, insurance, and banking. These are all highly regulated customer-facing industries.

The sharp increases across all skill needs points to the shifting landscape of workers.

Generation Z (comprised of people born in 1997 onward, according to Pew Research) has entered the workforce and needs tremendous development. At the same time, a lot of industry knowledge is retiring as Boomer exits escalate. Millennials are rapidly moving into leadership roles, and they want and need the training to support that transition into leadership. **The desire for video and content that learners can consume on demand is on the rise.** Today’s workers have fully integrated their smartphones into their personal lives; this integration is moving into their work lives, too.

WHAT CHALLENGES DO YOUR TARGET LEARNERS FACE THAT MAKE IT DIFFICULT FOR THEM TO BUILD THE KNOWLEDGE/SKILLS THEY NEED TO BE SUCCESSFUL?

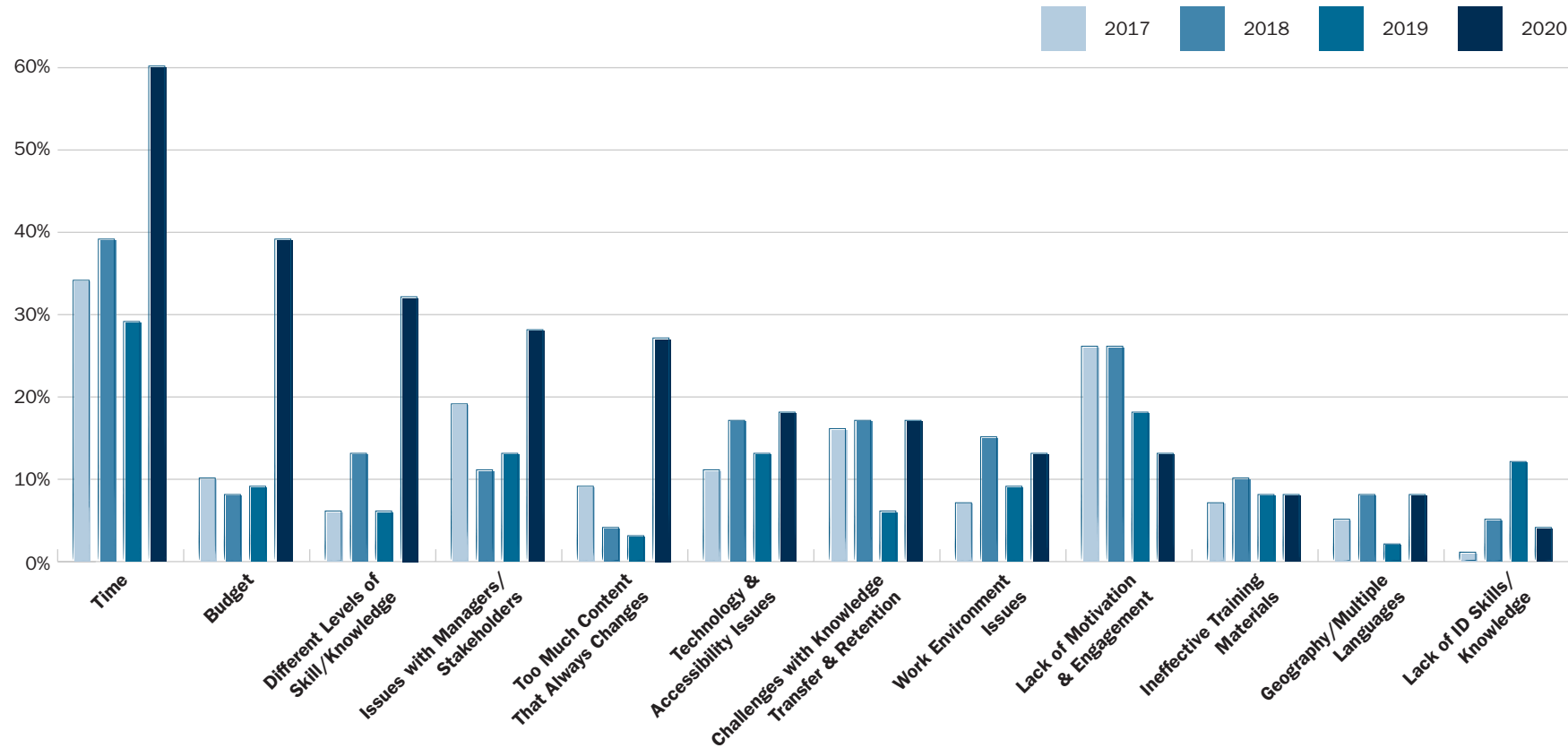


Time, time, time. There simply isn't enough of it. We heard it last year when nearly 50% of respondents listed it as one of their top 3 challenges. This year, the number jumped over 25%, strongly indicating the problem has gotten worse and not better. This worsening situation may explain the major jump that microlearning took as a 2020 delivery solution, along with another on-the-go solution, podcasts.

The other big jump worth noting is the increase in the number of people who selected issues with technology and accessibility. While the percentage is dramatically less than time as a challenge, it doubled in the number of people reporting it as an issue. The very devices and apps that are supposed to make things easier, such as Teams, Slack, and other virtual collaboration tools, can also become barriers when the tech doesn't work or isn't accessible for its users.

Challenges with motivation and engagement also experienced a dramatic uptick. This likely correlates with time. A stressed learner with little time for learning is unlikely to feel engaged or motivated by the learning experience. This then feeds into challenges with retention and knowledge transfer.

WHAT CHALLENGES DO YOU FACE WHEN YOU TRY TO HELP THESE LEARNERS BUILD THE NECESSARY KNOWLEDGE/SKILLS?



Time, money, and ever-changing content are the big challenges for those trying to support learners, with time taking the top spot by far. The skill/knowledge gap also poses a challenge.

Learners and creators both emphatically indicate they are taxed to the max. So, the question becomes: how do we solve the challenges of lack of time, lack of dollars, and ever-changing content? The rise of microlearning as a delivery solution alongside rapid content creation and DIY

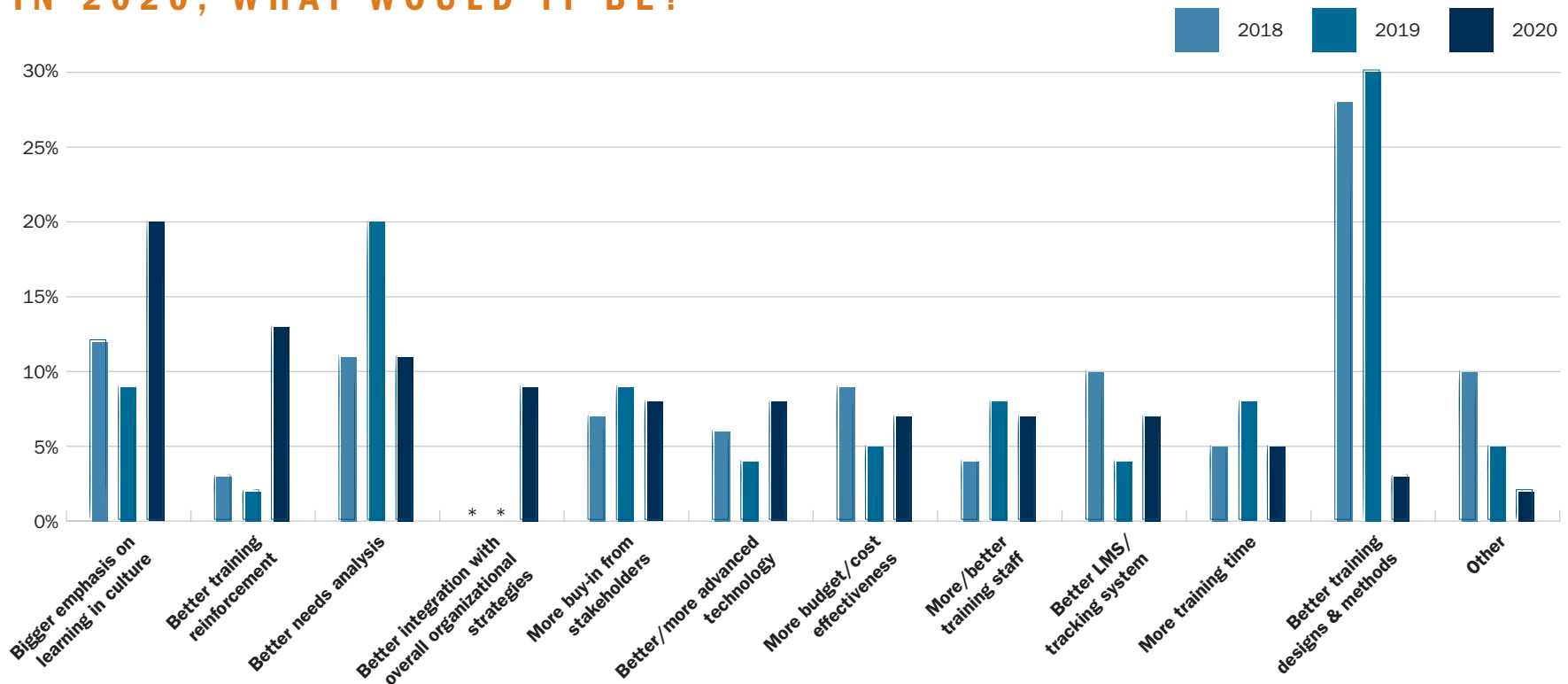
tools are a definite response to the issue of time/budget. The looming question, though, is whether these solutions are yielding the hoped-for business results.

The combination of no time for learners and content creators, mixed with a high demand for engaging content, creates a significant challenge for L&D. The answer may be to repurpose content so it can be served up in different ways. Instead of creating one course that everyone

takes, create multiple levels of the same content in a variety of modalities. One client example: for a physicians' app we developed for a major pharma company, the same content is repurposed via podcast, infographic, blog article, and video. This repurposing creates more opportunities to reach learners in a way that is most effective for the individual and the organization.

STRATEGIC ALIGNMENT

IF YOU COULD IMPROVE ONE THING ABOUT LEARNING & DEVELOPMENT AND/OR TRAINING AT YOUR ORGANIZATION IN 2020, WHAT WOULD IT BE?



A year can definitely change perspective.

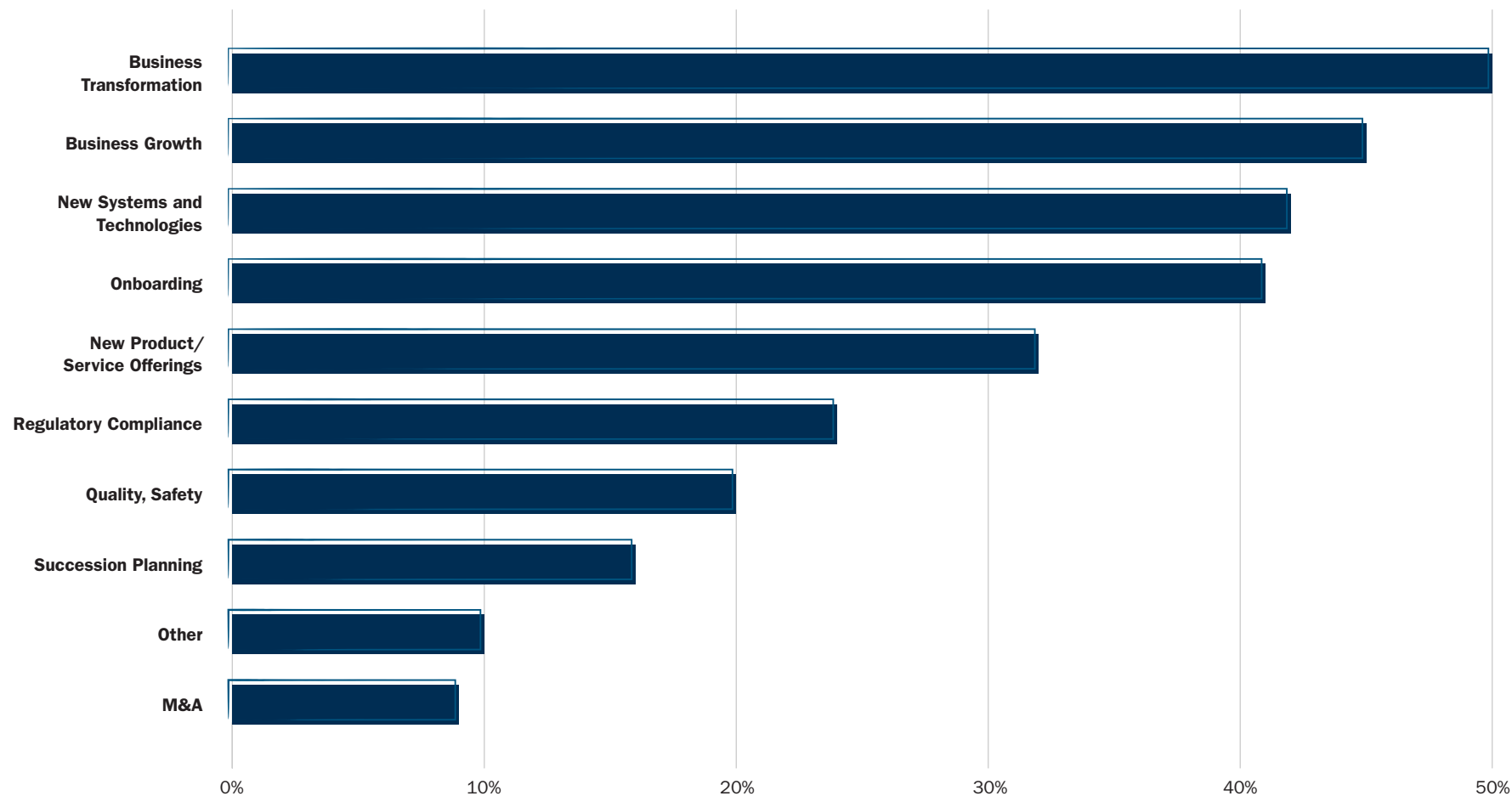
Last year's top response at 32% was "better training designs & methods." In 2020, "better training designs..." dropped down to third to last at 3% and was replaced at the top by "bigger emphasis on learning in culture," and "better training reinforcement" in the number two spot. This supports the rise in the demand of microlearning to support training, and the

buzz permeating organizations right now on the idea of "fostering a learning culture."

From a macro point of view, it is also in line with our previous thought that time and deadlines are the driving factors in professional learning. L&D wants to provide the best possible product, but it must do so within the confines of the current business climate. Developing a strong culture of learning is an entirely different mindset than one

of creating better content. Culture change moves slowly but is an undeniable influencer. If your organization has a culture and an expectation that supports continuous learning, the material itself doesn't need to be the driver of engagement. **The need to grow and evolve alongside your peers becomes the engine of change.** As leaders support and model learning practices in a myriad of forms, it fuels that engine.

WHAT ARE THE ORGANIZATIONAL OPPORTUNITIES THAT CREATE YOUR HIGHEST DEMAND FOR LEARNING & DEVELOPMENT?



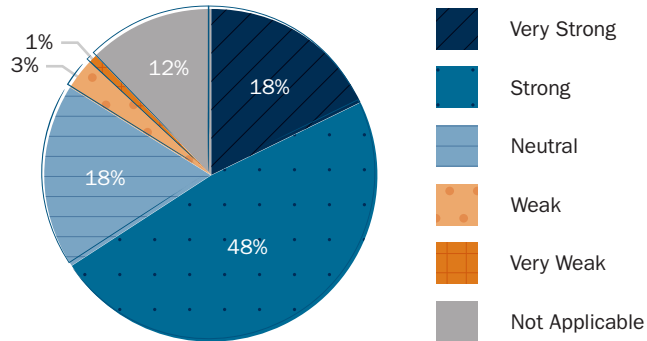
This item is new this year; it garnered five items that stood out from the others.

The drivers of demand for L&D are business transformation (#1), followed by business growth, new systems, employee onboarding, and new product offerings. These items all point to the value of strong alignment between L&D initiatives with the business's overall strategy. Learning and

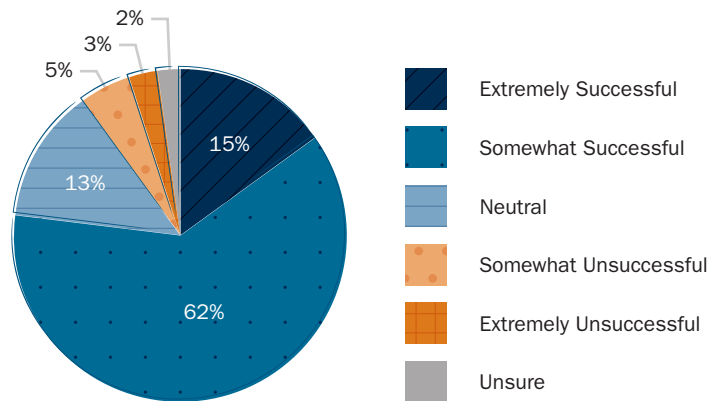
development offerings are a “strategy activation” tool: strategy gets activated through people, and L&D's purpose is to **elevate and enable the performance of people in activating strategy.**

PARTNERSHIP WITH THE BUSINESS

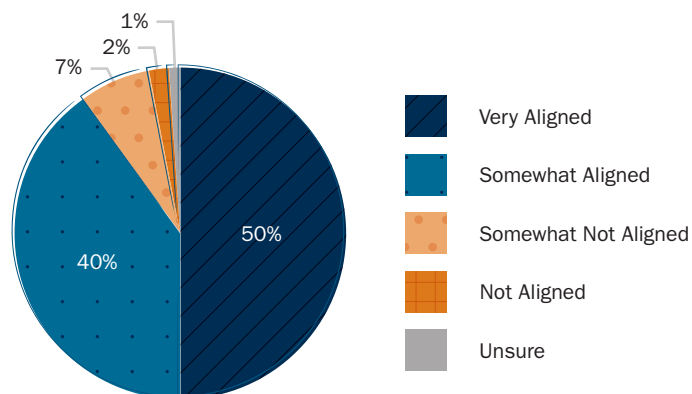
Overall, how would you rate your typical relationship with your average business sponsor?



How successful would you consider your 2019 learning & development efforts?



On average, how aligned are your L&D efforts with your organization's overall strategic initiatives?



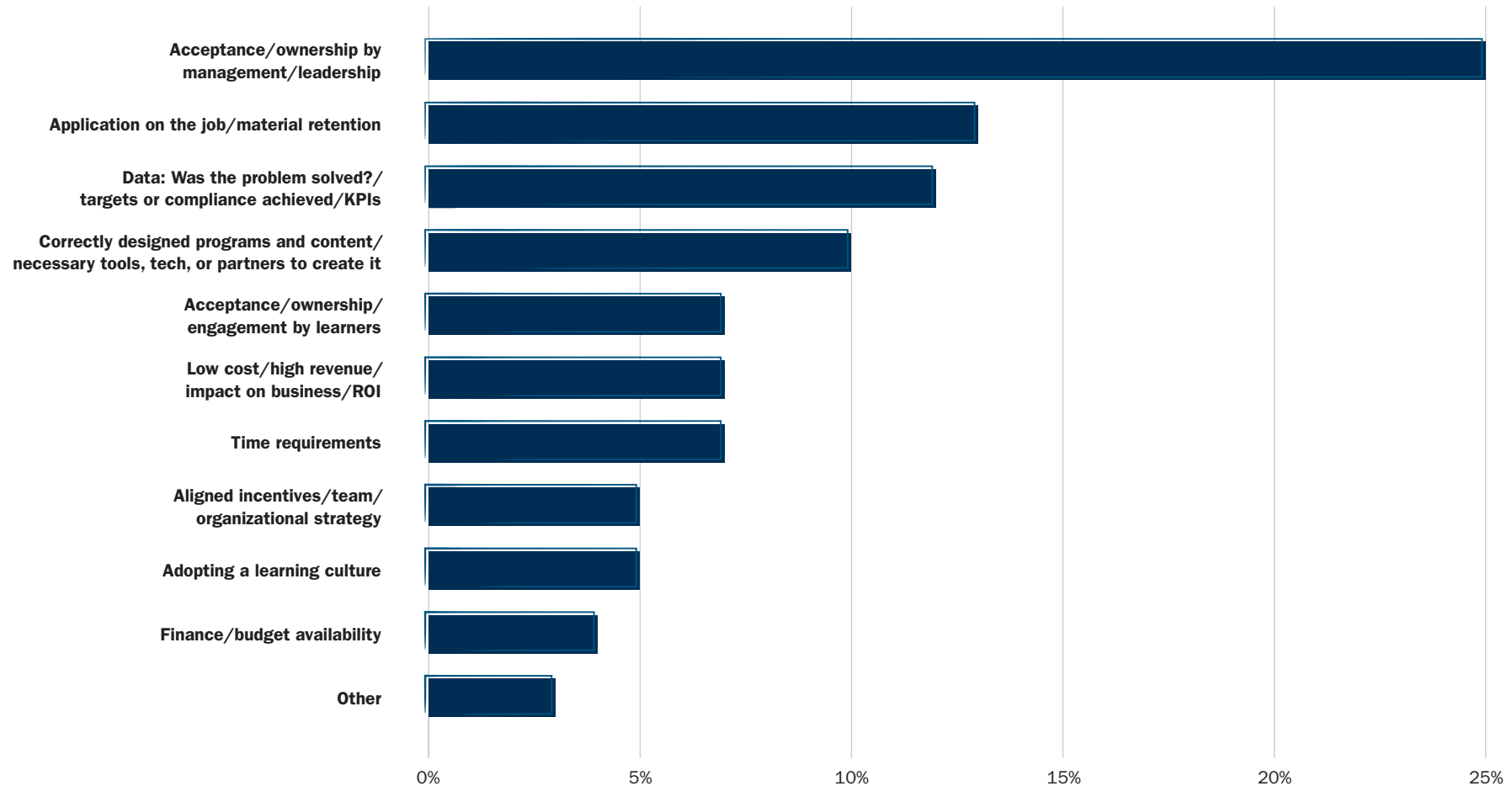
These 3 charts are shown together to compare:

- perceptions of relationships with business partners
- strength of alignment between offerings and strategy needs
- actual results

Sixty-six percent of respondents report very strong to strong relationships with their business partners. Fifty percent of respondents report tight alignment between their initiatives and company strategy; another 40% report they are at least somewhat aligned. There's definite opportunity for improvement in terms of alignment. That lack of tight alignment syncs up with the ratings on success: Only 15% of respondents indicate their L&D efforts were "extremely successful." The majority—62%—indicate their efforts were "somewhat successful." There is definite opportunity for L&D to become better partners with their business sponsors, pushing for better alignment between strategy and initiatives.

How are organizations and L&D leaders judging their work as successful? Are they measuring how L&D helped to activate a broader strategy, and are these efforts to craft relevant content that meets the needs of learners being seen as a valuable use of time? The final survey question dealt with factors that dictate success—and our respondents spoke up.

WHAT ARE THE KEY FACTORS THAT DETERMINE WHETHER YOUR LEARNING & DEVELOPMENT EFFORTS WILL BE SUCCESSFUL WITHIN YOUR ORGANIZATION OR NOT?



The biggest driver of success was some variation of the words “leadership support” or “management buy-in.” This thought that leadership or top-down support drives success ties neatly to the desire to develop a learning culture (Q10). A holistic view of **continuous learning** or a **growth mindset** is compelling and can have a profound impact on an organization. This tone can be set by the leadership and supported and sustained by L&D. Or it may be that “leadership support” is defined as giving people enough time

and space to learn. Interestingly, even though time is cited as the most significant barrier for learners and those creating the learning, it only accounted for 7% of responses related to key factors determining whether L&D efforts will be successful. Perhaps we can draw the conclusion that time as a resource is precious, but the deciding factor for L&D success is how L&D is empowered to use the time they have.

OUR TOP TAKEAWAYS

TIME IS THE MAJOR PAIN POINT FOR EVERYONE: LEADERS, DO-ERS, AND CREATORS OF CONTENT.

Microlearning's dramatic rise in popularity appears to be a response to people's perception that lack of time for learning is an increasing challenge. ATD's State of the Industry Report shows that time spent in formal training has held steady for years (about 34 hours per year), but that statistic is an average across an entire organization and not a reflection of what any one individual might do in a year. Clearly workers are feeling more and more stretched.

Those solutions that truly support helping someone reskill, maintain skills, or perform tasks with "just-in-time" information will be in high demand. Solutions that enable easy searching and filtering will fare the best and be the best received by learners. Jane Hart has published survey results on modern workplace learning since 2010. The *top* preferences of learners are to learn through their daily work. The bottom choices? Classroom instruction and eLearning courses. Her data consistently show that workers value a great search tool *by far* over formal instruction.

MANY OF THE L&D CHALLENGES WE HEARD TIE INTO BROADER ORGANIZATIONAL "PROBLEM SPACES."

Digital transformation, cybersecurity, labor and skill shortages, scaling workforces, talent acquisition, talent retention, and workforce automation are all problems/needs that were clearly represented in survey responses about solutions they are using and learning needs they are addressing.


How deliberately are we matching up solutions with the needs? Do we keep going back and re-using the same Big 4 solutions we've always used (ILT, VILT, eLearning, video)? Or are we evolving our solutions to fit the changing landscapes of learners and the environments they are in?

INTEREST IN AR/VR IS SKYROCKETING. USE CASES NEED TO BE CLEARLY DEFINED TO OPTIMIZE THE VALUE OF THE SOLUTIONS.

Skill-building and attitude evolution are two major opportunities for these technologies—but only if the business need is large scale. A third opportunity is pulling people together real-time within virtual spaces. Their current costs preclude using them for small-scale endeavors, such as training a handful of people. Their novelty factor is likely to appeal, but VR's latency problems are not yet resolved, which means a significant subset of the population continues to get motion sick when using these systems. AR has a lower barrier to entry but is less captivating to many. It functions best when blended with other solutions and when used to educate rather than motivate or inspire.

LEARNER EXPERIENCE (LX) MATTERS, BUT LX EFFORTS MUST BENEFIT BOTH THE LEARNER AND THE BUSINESS.

Learners' time is at an all-time premium. They won't easily give it up for a training or learning experience that isn't **highly relevant** and **easily consumed**. Design thinking approaches that look for the “sweet spot” between the needs of the business *and* the needs of humans can yield successful solutions that factor in the constraints they both operate within, such as lack of time. The truth is that we must get better at embracing the concept that work is learning, and learning is the work (Jarche, 2012). We can't step away from work to learn; we learn while working.



What matters is that L&D effectively and efficiently activates the organization's strategy through people.

DEMAND FOR SKILLS IS INCREASING.

Technical and soft skills training needs are ratcheting up. As technology changes rapidly, the need for reskilling occurs. While one generation leaves the workforce and a new one enters, basic skills development in soft skills and technical skills needs to happen. Add on tightening labor markets and issues with talent acquisition, and it's clear that more investment is needed to acquire *and* retain people.

THE BIG 4: THEIR LEGACY CONTINUES. WILL IT PERSIST?

Will we ever move away from the Big 4 (eLearning, ILT, VILT, and video)? The content is easy to create and relatively inexpensive. Learners know what to expect, and the C-suite knows what they are paying for. But, are the Big 4 yielding the needed results and adding value to your organization? Are they the top choice for strategy activation, or do they reflect how we are used to working?

We are amid a massive generational shift. Boomers are retiring at a higher velocity each year, millennials are moving into leadership roles with their Generation X partners, while the next generation enters the workforce in need of skills and development. L&D needs to change with the times, but how much change is required? Maybe supplementing VILT with podcasts is enough. Maybe chopping, slicing, and dicing an eLearning into microlearning will get the job done. Take note: contemporary learners are savvy, comfortable with learning from video, and pressed for time. Does the Big 4 fulfill those needs? Based on Hart's workplace learning survey we referenced earlier in this report, the answer is "no."

At TiER1, we see this problem with a holistic view that blurs, bends, and morphs the Big 4 as needed. ILT and VILT can very useful, but we think they're more effective when blended with a worker's ability to search for microlearning videos and interactive tools that help them sustain learning or get information just when they need it. eLearning can be great for onboarding or deploying content to a broad audience but will make a more significant impact when it is concise, mobile, and augmented with game design elements that integrate within an engaging and easy-to-use LX platform.

HOW DO YOU EVALUATE, SENSE, AND SEE WHAT IS COMING?

It may seem like staying on top of trends can seem optional in L&D, if your focus is only on solution spaces. The Big 4, for example, have stayed constant for many years, while other trends seem to come and go. However, figuring out where problems and solutions might intersect is where the opportunity really exists—and where L&D practitioners can become true business partners.

TIER1 has evolved this approach to figuring out the intersection of L&D and business. As promised, this report holds more than a report-out of trends and tech. What follows is a framework you can use. We hope it's helpful for exploring what's possible and what should be scaled.

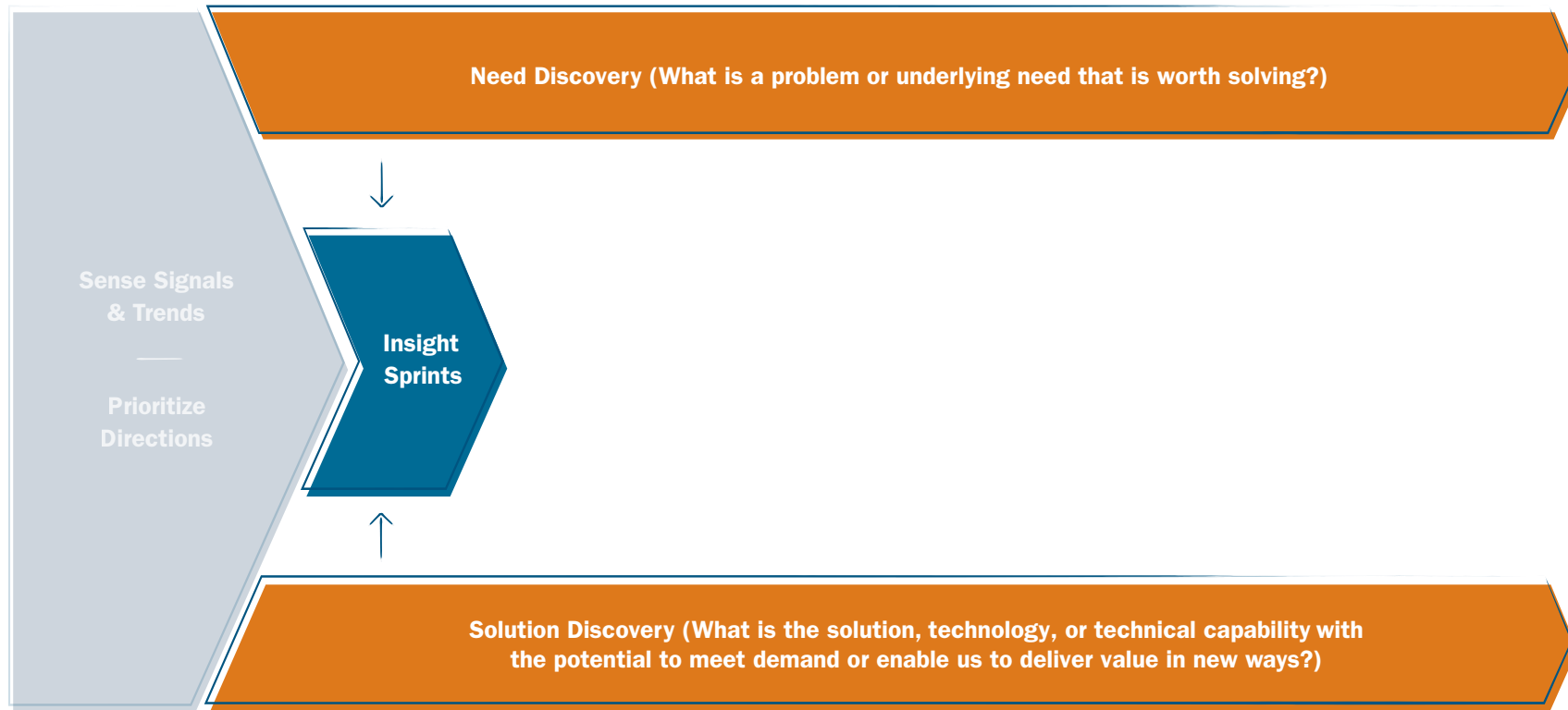
FRAMEWORK FOR NAVIGATING L&D TRENDS



IT STARTS WITH SENSING

This primarily involves searching for the signals, trends, and emerging technology as well as for emerging problem spaces. That search may involve:

- 1.** Doing regular media and publication/website reviews (an hour or two per week).
 - MIT Technology Review Daily Downloads
 - Forbes, Fortune, TechCrunch, Business Insider, etc.
 - Industry reports (i.e. ATD, Guild research reports for learning industry)
 - Conference backchannel reviews via Twitter
- 2.** Talking with curious people within or outside your organization.
- 3.** Talking to the salespeople within your organization, because they are talking to customers and those outside your organization.
- 4.** Talking to the clients you serve and discovering what trends and problems they are paying attention to and why.
- 5.** Paying attention to the strategies defined by your organization: What problems are they trying to address? What growth goals have they set?



Once trends have been sensed, it's time to identify the potential needs and solutions. This is done through an insight sprint.

WHAT IS AN INSIGHT SPRINT?

Insight Sprints allow you to take a dynamic, on-demand look at major trends shaping the regions and functions that you serve. These trends and tech could support L&D's efforts to help users navigate challenges, seize opportunities, and connect with solutions. This is a concentrated effort of 40-ish hours spread between 2-4 weeks where you and a diverse team dive deeper on a specific problem or solution space.

THE GOAL OF AN INSIGHT SPRINT IS TO ANSWER 3 QUESTIONS:

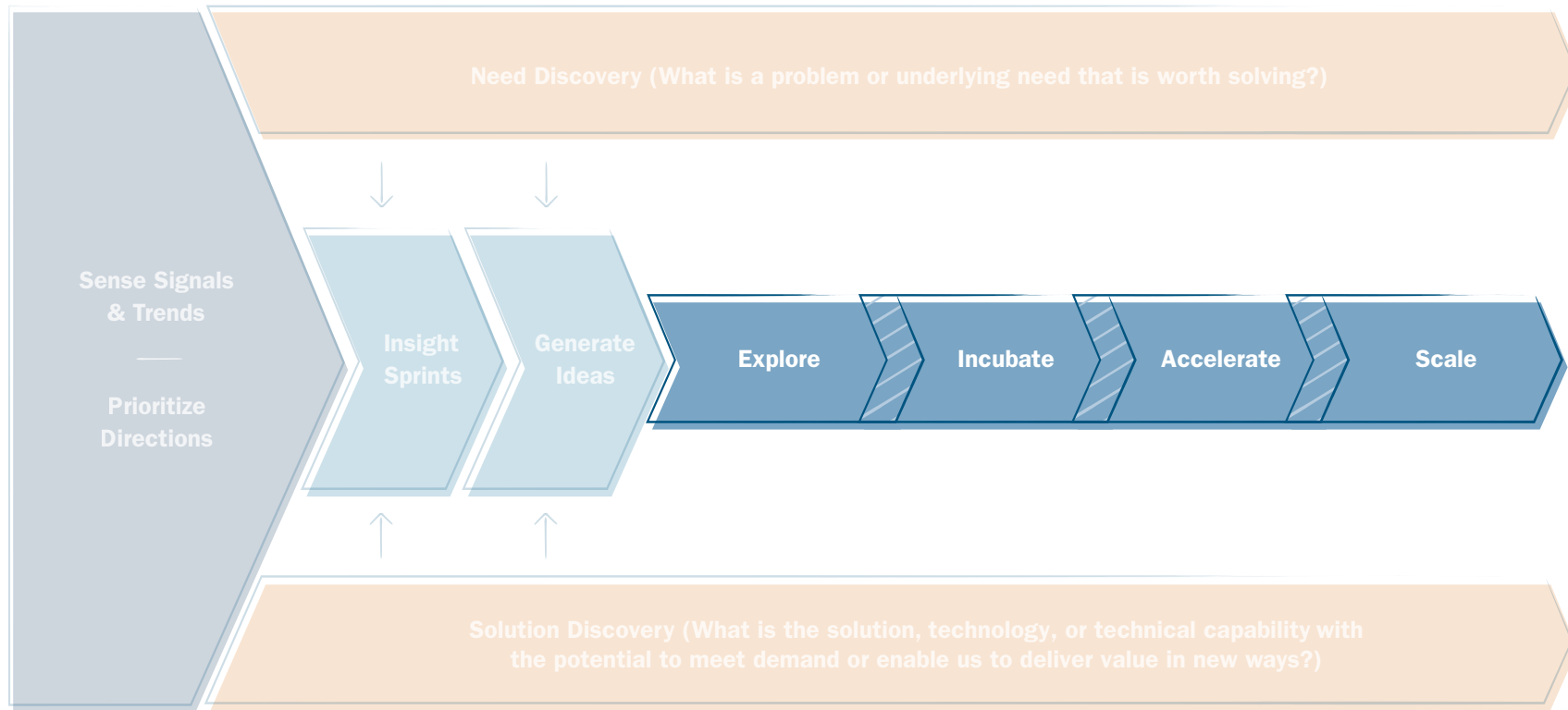
What is the trend in the context of your target users' circumstance?

What is your perspective on the challenges and opportunities this trend presents?

How can your organization's current offerings help users or customers address challenges and capture opportunities identified?

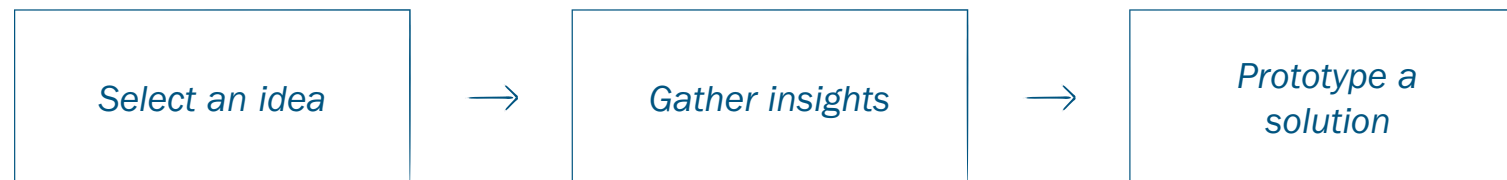
By answering these questions, you put the trend into context and connect it with specific opportunities that are immediately actionable for a targeted group of users and needs. This is your point of view. Based on this point of view, you and the team generate ideas.

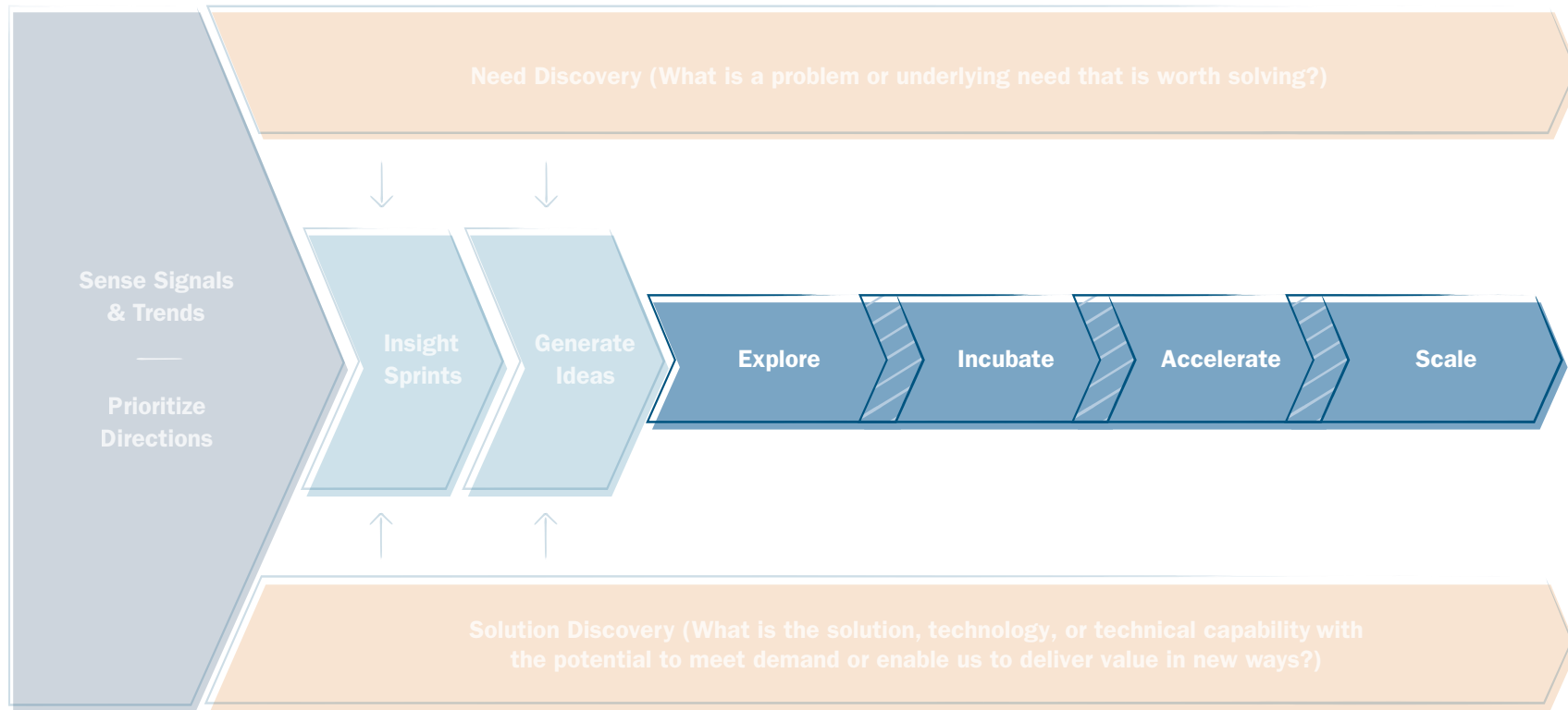




MOVE TO EXPLORATION

After you formulate a point of view and generate initial ideas, you select ONE idea and proceed to explore it. You define a problem, gather insights on those who are facing the problem, and then ideate and prototype a solution. If initial testing goes well, you can proceed to incubate that idea. You go beyond the initial exploration project and try your idea out further. You refine your point of view and build some examples of success. If and when you see ROI, you accelerate. If you do not, then you can abandon or iterate to revise your solution.





ITERATE, EVALUATE, AND MOVE FORWARD

The idea is to allow a large block of things to reside on the left and a small percentage of things to work their way to the right.

Ideas that are incubating



Ideas worth pursuing



Execute small experiments that you can either abandon or build from, depending on outcomes. Establish metrics that enable you to determine whether to pivot or persevere. Every organization is going to establish different metrics. Common evaluation criteria will be time to ROI, level of risk, and ease of scaling.

CONCLUSION

TRENDS AND TECH ARE PERENNIAL TOPICS; BUSINESS AND USER NEEDS ARE CRITICAL FACTORS.

In L&D an overemphasis on trends and tech related to solutions can prevent us from paying attention to the problems our organizations need our support in solving. Evaluate all potential solutions by considering the problems they can help solve. Be skeptical of the Big 4; consider how else you might solve a challenge besides resorting to an eLearning course or ILT. Consider the emerging trends and tech where you can see measurable value, especially where it can take shape and activate your organization's strategies through people via scalable, maintainable solutions.

Want to learn more? Let's talk!

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ABOUT THE AUTHORS



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Managing Director

Sharon spends her days at TiER1 helping clients devise ways to activate strategy. She partners with her colleagues at TiER1 to bring together the disciplines of learning, change, communication, technology, and creative to produce blended solutions that enable people to do their best work.

Sharon has 25+ years within the L&D industry. She is a frequent speaker at industry conferences on topics such as design thinking, learning experience design, game-based learning, and technologies and trends. She is the author of two books and has a third one coming out in June of this year: *Design Thinking for T&D: Creating Intentional Learning Experiences*. Her books have all been published by ATD Press.

Her industry interests are wide-ranging; they include storytelling, emerging technologies, business strategy, leadership, learning, and experience design.



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Joe is a Senior Learning Consultant with TiER1 Performance, where he focuses on crafting creative and engaging solutions to contemporary learning challenges. He has 15+ years of experience in the classroom as a music teacher, where he specialized in blended and flipped instruction using video lessons as well as focusing on problem-solving and collaboration. Joe also spent two years as an education consultant, focusing on the effective use and integration of technology in schools.

WE ACTIVATE YOUR STRATEGIES THROUGH *people*

Strategy is only as valuable as the activation behind it: how it shows up, how work gets done, how your employees own it, and how your customers experience it.

HOW WE *activate* STRATEGY



Consult

Identify and align on performance factors needed for activation.

In addition to driving clarity around the desired future state, we partner to understand how the unique dynamics of your organization (culture, leadership, roles, systems, etc.) intersect and influence each other to create opportunities and overcome barriers for successful strategy activation.



Design

Create the performance experience and everything needed to sustain it.

We deliver the plan and detail needed for your people to be empowered and aligned around your strategy: outlining key training, communication, performance support tools, technology, and associated timelines in a clearly articulated blueprint, journey map, or experience design.



Build

Activate strategy through engaging, results-focused deliverables.

From custom technology to high-volume communication and training, our studio teams of instructional designers, software developers, designers, copywriters, and videographers create engaging deliverables that allow your people to have what they need when they need it—boom, strategy activated.

CUSTOM SOLUTIONS THAT *activate* STRATEGY

Every organization has different strategic priorities—and therefore different needs. We custom-craft the solution that is right for you.

SYSTEMS ADOPTION · DIGITAL TRANSFORMATION · EXPERIENCE DESIGN · CHANGE STRATEGY · ONBOARDING · SALES ENABLEMENT
PERFORMANCE MANAGEMENT · TALENT DEVELOPMENT · CUSTOM PORTALS · CULTURE · CORPORATE COMMUNICATIONS

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