

2015

Learning & Development Technology Trends Report

3rd Annual Survey and Results

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group

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Introduction

The global marketplace is in a constant state of change and is more connected than ever before. How are some of the world's largest organizations investing in, planning for and utilizing L&D technology in 2015?

Impact Instruction Group conducted its 3rd annual Learning & Development Technology survey to get a pulse on the changes in L&D technology behaviors and trends in 2015.

In this report, we tracked learning technology trends across six areas:

1. Categories of learning technologies that companies will invest in 2015
2. Leadership interest in implementing new technologies
3. Maturity of corporate mobile learning strategies
4. Staffing plans for mobile initiatives
5. Utilization of enterprise social tools in training
6. Use of xAPI, or Tin can API software

We also compared the data from our 2013 and 2014 technology reports to determine the changes in trends over last three years.

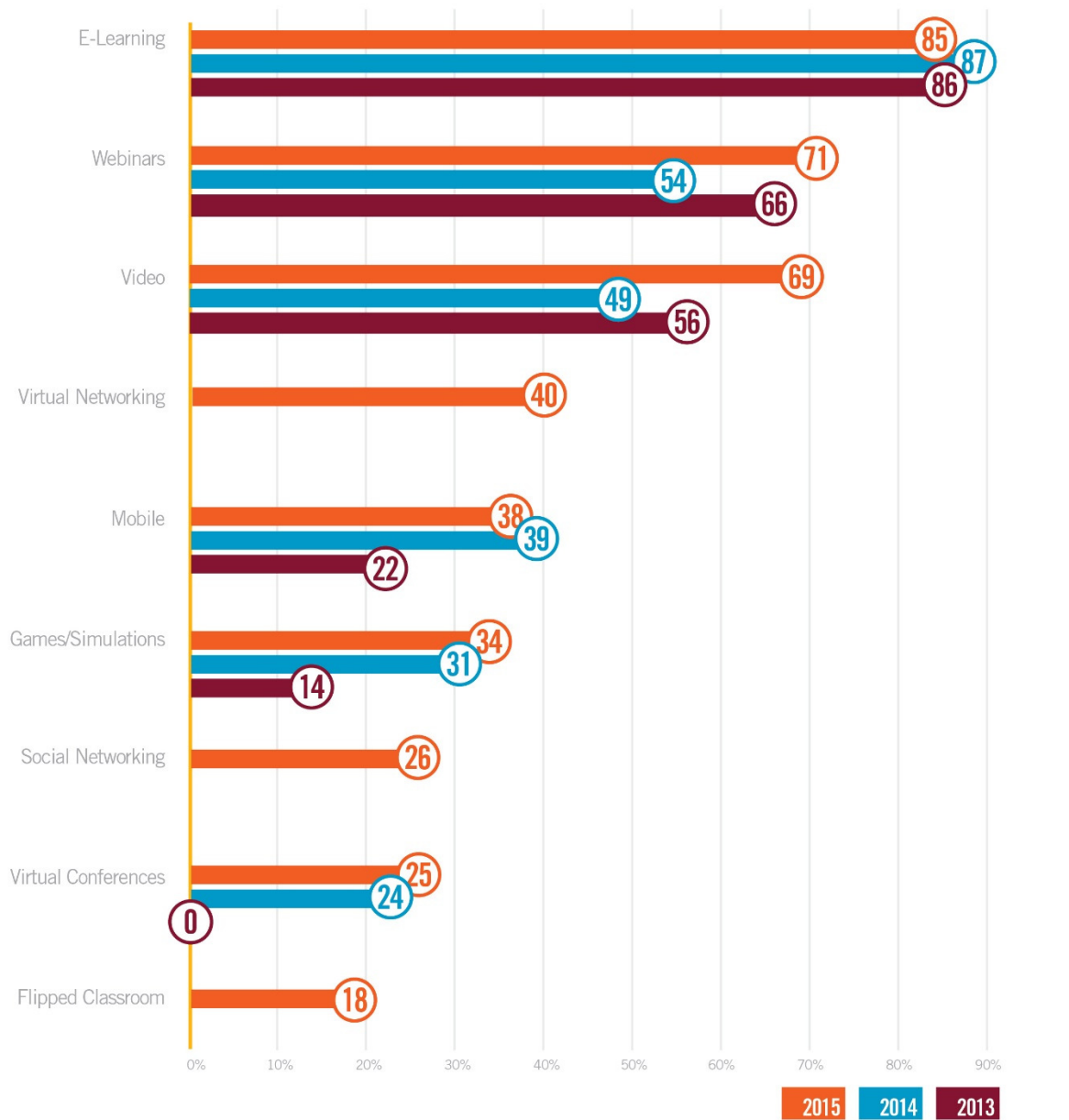
As technology offerings continue to become more robust, so do our capabilities to offer learning in a way that makes it interesting and convenient for our learners. This report offers trends data on learning and development technologies.

Survey Highlights

1. **Investment:** Still ranking #1 in technology investment is eLearning at 85%; however, webinars came in second, making a comeback with an increase of 17% over last year. Videos also jumped 20% this year over last, the largest increase. Virtual Networking was a new category this year, with 40% of respondents investing in it this year. Mobile, Games, Social Networking, Virtual Conferences, and Flipped Classroom remained close to last year's numbers.
2. **Leadership:** In 2015, we are seeing an increase in leadership-level interest with implementing technology-based solutions. A combined 72% said their leadership team's interest is increasing, up from 66% in 2014. 26% have the same interest as last year, and only 1% is reluctant, down from 9% in 2014.
3. **Strategy:** The majority of respondents (44%) said that they have new mobile devices in their organizations, and now a learning strategy is needed to address it. None of our respondents have a fully-adopted strategy; 14% have strategies and plan to implement them in the coming year, and 26% are planning to explore mobile learning in 2015.
4. **Staffing:** When asked how their staff is going to address mobile trends, the majority of respondents (35%) stated that they are going to train their current staff. Only 12% stated that they have the necessary team members currently in place, down from 21% in 2014. Another 12% are looking to add new team members with strong mobile technology backgrounds and skills. 11% plan to outsource mobile technology to vendors.
5. **Enterprise Social Networking Tool:** Adoption of an enterprise social networking tool was split at 50%. Of the 50% that said yes, 49% allow learners to post questions and seek answers from co-workers, 43% allow learners to share knowledge and work experience, and 40% allow learners to pull work-related information and learning. Only 26% use the tool to push out learning, 38% to promote events, and only 11% analyze conversations to identify learners' needs and trends.

6. **Adoption of xAPI:** None of our respondents have implemented the Tin Can API, and another 48% have no plans to implement the technology. 35% have never heard of it. However, 17% of our respondents are considering implementation and plan to explore it further this year.

Q1 In which technology-based learning and performance support methods will your organization invest in 2015?



Every year as we explore investment initiatives associated with technology-based learning, we have added more to the list. New to 2015 are virtual and social networking and the flipped classroom. Last year we saw a dip in webinars and videos, but this year, we are seeing a comeback of some of the more traditional forms of training.

Below is a list of several trends (no particular order) that we are experiencing in the technology-based learning space:

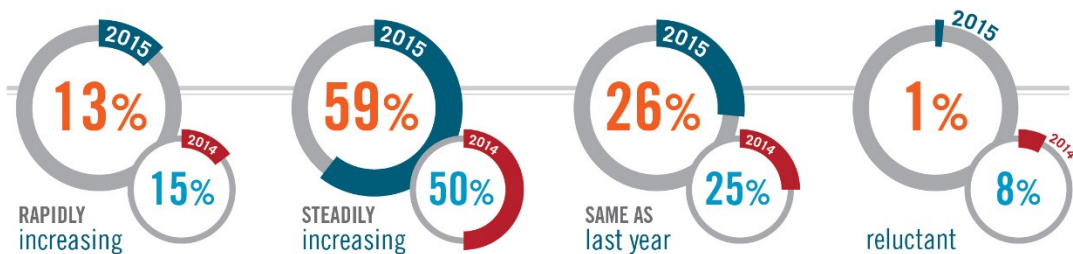
- **Increasing use of video**, with both formal and informal learning experiences.
- **Fully virtual conferences and symposiums** are increasing, as well as the need for the learning materials to support them. In addition, live conferences are increasingly using social media and mobile apps for support and ongoing networking and learning post-event.
- Increasing requests for **design and delivery optimized for mobile devices**, especially with field organizations.
- **Flipped classroom concepts** are growing in the corporate space.
- **Personalized learning**: the rise in role-specific curriculum plans that accelerate both onboarding and ongoing development; incorporates a blended learning approach¹.
- Continued implementation of **games and simulations**.
- **Cloud-based tools** for all facets of learning – including content sharing, collaboration, and learning management. More organizations are experimenting with learning management tools outside the traditional LMS realm.
- Ever shorter and **more focused eLearning courses**, with a growing emphasis on **performance support**; you may see this characterized as “micro-learning.”
- Growth of the **virtual classroom** environment as a blending of live facilitation with technology-based infrastructures.
- Increasing emphasis on **data-driven decisions**; with the evolution towards Tin Can API, learning organizations will have access to more data on learning interactions.
- **MOOCs (massive open online courses, such as Coursera) and also SPOCs (small private online courses)**² will continue in popularity, and their concepts can have

¹ <http://elearninginfographics.com/top-10-elearning-trends-2015-infographic/>

² http://theelearningcoach.com/elearning_design/learning-design-trends-2015/

adaptations to our corporate environments. SPOCs especially because of their personalization aspects.

Q2 I would characterize my leadership team's interest in implementing technology-based learning and performance solutions as:



It's not surprising to see an increasing interest from leadership in implementing technology-based learning and performance solutions. Over 70% of our survey respondents have noted this trend in their organizations. As technology continues to move forward, so must our initiatives to provide learning opportunities that best leverage those technologies and make sense for the organization.

Organizations are increasingly selective with the investments being made in learning initiatives. In order to capture the attention of leadership, IT'S MORE IMPORTANT THAN EVER THAT AS LEARNING PRACTITIONERS, WE ARE ABLE TO CONNECT THE INVESTMENT IN TECHNOLOGY-BASED LEARNING INITIATIVES TO COMPANY GOALS, AND DEMONSTRATE RETURN ON INVESTMENT.

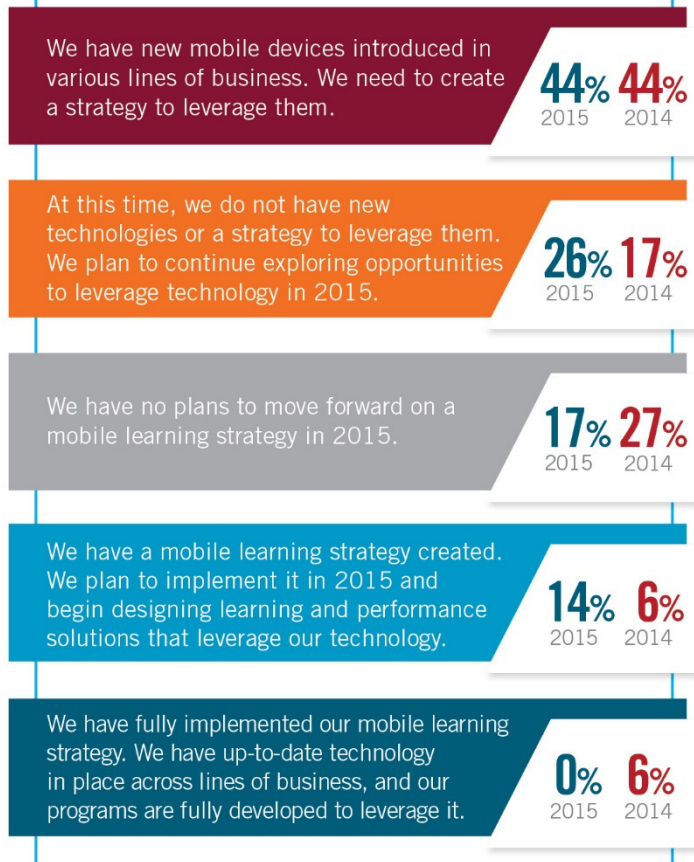
What are some key ways you can accomplish this?

- **Know the core strategic initiatives of your organization.** By staying on top of this information, you will know what is important to leadership, and then be able to articulate how your learning initiatives directly tie to accomplishing those strategies.
- **Develop an understanding of IT initiatives taking place within your organization,** and how those initiatives are intended to impact the organization. Knowing IT initiatives will help you to identify core technologies being considered, and how your choices of learning-related technologies will integrate with the bigger picture.

- **Build cross-functional relationships within your organization.** One client training initiative we are currently working on involves mobile learning, and at the table we have a cross-functional group of sales leaders, mobile developers, and training. Having those relationships, speaking their language, and knowing what is important to each group builds credibility of the training function.
- **Track general IT industry trends that may affect how you pursue learning initiatives³.** Some of the top IT trends for 2015 include cloud-based infrastructures, everywhere computing, a growing Internet of Things (IoT), and the advance of analytics. A basic knowledge base of these key trends will open up new avenues to explore for technology-based learning.
- **Develop an understanding of change management principles,** as well as any specific change management processes within your organization.
- **Follow thought-leaders within the learning space that have specialities in technology-based learning.** One organization that we know of spends time each month with executive leaders to educate them on the latest thought leadership, tools, and trends in technology that affect learning and development.

³ <http://www.forbes.com/sites/peterhigh/2014/10/07/gartner-top-10-strategic-it-trends-for-2015/>

Q3 How would you characterize your company's adoption of mobile learning?



The data points in this question have remained largely the same from 2014 to 2015. We still have 44% of respondents with mobile devices introduced into their environments, yet they are still in need of a strategy. None of our survey respondents claimed to have a fully implemented mobile learning strategy. We did see a small increase in organizations, up to 14%, that have a mobile learning strategy created, and they are now working in 2015 to implement that strategy.

*The combination of a global and virtual workforce, multiple generations in the workplace, mobile for business interactions, and the ubiquitous use of devices in our personal lives all point to the **NEED TO INCORPORATE A LEVEL OF MOBILE AND SOCIAL LEARNING INTO OUR WORK ENVIRONMENTS.** Learning organizations need to begin building and implementing strategies to keep pace that align to ever-changing business priorities.*

We can look to retail research to inform us on human behavior trends that can also be applied to learning and development:

- When it comes to mobile device usage (phone and tablet), the average consumer will use their device for a number of shopping activities – finding deals, doing research, and comparing products⁴. Of those activities, they are using the phone more often than the tablet, especially in-store. However, when it comes to actually making a purchase, a personal computer is for most shoppers (laptop or desktop), their preferred device.⁵
- 80% of smartphone owners want more mobile-optimized product information while they're shopping in stores⁶. (Source: Moosylvania, 2013)
- 54% of US and Canadian consumers would consider ending their loyalty relationships if they were not given tailor-made, relevant content and offers (Source: CMO Council, 2012)

How can this data inform us as we design and implement a mobile learning strategy?

- Pay attention to human behavior trends outside of formal learning and development – we can learn a lot about user experience, user interface, and content from other environments.
- When it comes to higher cognitive load and deeper thinking, more screen real estate may be better. By nature, the small real estate offered by phones (and some tablets) can make them better candidates for “quick hit” content. Someone will likely need more time, space, and other modalities for content requiring deeper thinking, application, and interaction.
- People likely have an expectation that the mobile experience they have in their personal lives is something they will have in their work environment. If 80% of smartphone users want easy access to mobile-optimized information for their shopping experience, it's likely they will also want (and use) the right mobile-optimized content for their learning.
- Successful organizations have high levels of employee engagement. One of the roots of engagement is providing relevant learning opportunities. What if we were able to provide some of those learning opportunities on devices they have at their fingertips?
- Think through the various device combinations you may be designing for, because your content design and substance may only be optimized on certain device types. Mobile may not always be the answer.

⁴ <https://www.internetretailer.com/2014/11/05/73-consumers-will-holiday-shop-their-mobile-devices>

⁵ <https://www.internetretailer.com/2014/05/15/tablets-become-more-popular-shopping-device>

⁶ <http://digby.com/mobile-statistics/>

- Always keep the end outcome in mind. When we are clear on the learning objectives, the business results we are looking for, and the audience, that can guide our choices on how we implement mobile into our learning environments.

Toward Maturity's *Mobile Learning in the Workplace*⁷ cites several key organizational drivers and barriers when it comes to implementing mobile learning.

Key organizational drivers:

- Improved access to learning at the exact point of need
- Increased employee engagement, and especially with millennials
- Ease of communication
- Increases in productivity
- Access to broader ranges of content, and informal/social learning opportunities
- Increased reach of best practices
- Improved support of organizational change initiatives

Key organizational barriers:

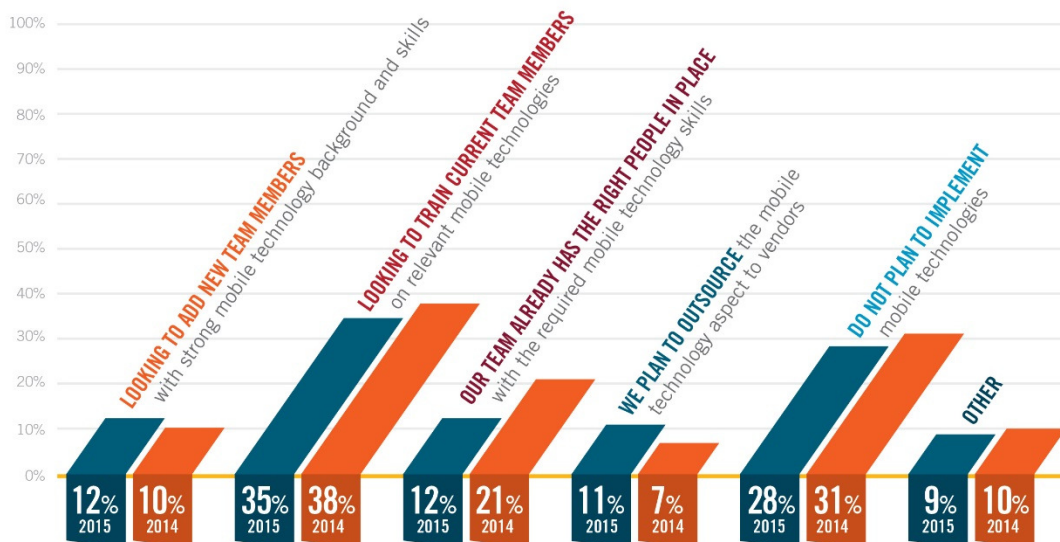
- Bring Your Own Device (BYOD) policies, versus devices supplied by the organization
- Cost of acquiring and implementing devices and their associated technologies
- Costs of repurposing or redesigning content to suit mobile environments
- Mobile device management
- Loss of control over corporate data, especially in regulated industries
- Perceptions around lack of usage, and especially generational perceptions
- Learning management systems that aren't optimized for mobile technologies

With all of these considerations, how do you begin experimenting with mobile learning?

- **Identify a specific business need** that may be solved with mobile learning; create your case that specifies how mobile learning will address it, as well as intended outcomes and ties to business goals.
- **Create a strategy document.** When we work with clients on mobile, we'll analyze a number of different areas – including business outcomes, content, process, technology, audience considerations, learning team considerations, and long-term sustainability.
- **Start small.** A pilot project can help you create a small win that can be amplified. You'll keep risk low; you'll learn what works for your organization and what doesn't work. The outcomes of the pilot project can then be scaled to other parts of the organization. Performance support and informal video are often two great modalities to begin experimenting with mobile.

⁷ <http://towardsmaturity.org/shop/wp-content/uploads/2014/06/In-Focus-2014-Report-Mobile-Learning-in-the-Workplace.pdf>

Q4 In 2015, how will your organization's L&D teams be staffed to keep up with the growing mobile learning emphasis in training?



In looking at this data, the number that caught our attention is the decrease in organizations stating that they have the right people in place to meet the growing emphasis in mobile learning.

The skills conversation is an important one, as more than 70% of organizations surveyed for the *2014 Corporate Learning Factbook*⁸ cite “capability gaps” as one of their top five challenges. Within many of those companies it takes 3-5 years for a seasoned employee to become fully productive.

So what are some of the optimal skills a learning team needs to stay at the forefront of technology-related and mobile learning initiatives? We have found it’s a blend of technical, business, and interpersonal areas, and we can learn a lot from the competencies related to mobile design and development:

⁸ <http://blogs.sap.com/innovation/human-resources/3-reasons-that-corporate-training-is-booming-01253568> and <http://www.bersin.com/corporate-learning-factbook-2014>

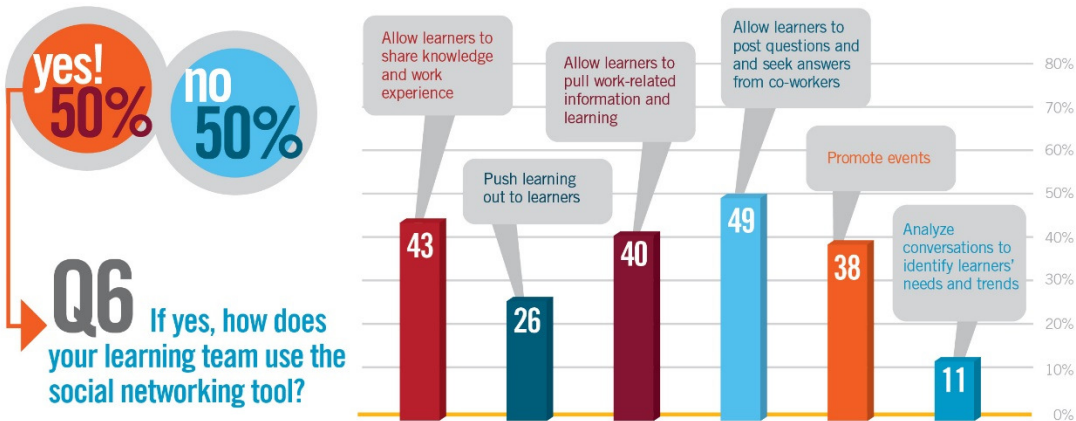
TECHNICAL	BUSINESS	INTERPERSONAL
Blend of instructional design and development acumen – moving fluidly between the two disciplines	Speaking the language of the organization's business, not just the language of training	Emotional intelligence
Current on development tools in both the eLearning and the mobile worlds	Making connections between various data points to see the full picture, and tying data points to results; following trends on Big Data	Ability to act confidently and without much direction
Creating content that is optimized for mobile device delivery	Holistic thinking: being able to see the whole and how you fit into it ⁹	Process and interpret data quickly – developing working knowledge in a very short amount of time and applying that to the situation at hand, cognitive load management ¹⁰
Working knowledge of user experience and user interface ¹¹ , and applying that to instructional methodologies	Storytelling – getting beyond data points and being able to influence others and create emotional ties through story	Comfort with ambiguity and fluid situations
Working knowledge of virtual collaboration tools; Social media acumen and social tools	Agile project methodologies – in the training realm, SAM (successive approximation model)	Ability to collaborate virtually

⁹ http://www.huffingtonpost.com/nicholas-enna/workforce-of-the-future_b_5412251.html

¹⁰ http://cdn.theatlantic.com/static/front/docs/sponsored/phoenix/future_work_skills_2020.pdf

¹¹ <http://www.business2community.com/mobile-apps/top-5-skills-employers-look-mobile-app-developer-01066250>

Q5 Has your organization adopted an enterprise social networking tool?



This is a new question for our 2015 trends survey. The utilization of enterprise social networking tools is on the rise and it's only a matter of time before we utilize them in our learning and development plans. *Chief Learning Officer Magazine* defines enterprise social networks (ESN) as “private internal software platforms designed to engage employees while fostering collaboration, communication, knowledge sharing and informal learning.” These platforms have evolved from the intranet days of the 1990s and the rise of social networking platforms in the 2000s. ESN's are a growing business, and expected to be a \$2.7B industry by 2017.¹²

Our respondents were cut right down the middle, with half of their organizations adopting an enterprise social networking tool. Of that 50%, it appears that half of training departments are utilizing the tool to create shared learning experiences amongst co-workers, and allowing learners to pull work-related information and learning from the tool.

CLO Magazine also cites “industry research suggesting 70-80% of learning is informal; therefore, including social networking in learning strategies provides for more complete learning environments.” We expect to see these numbers increase as use and functionality increases in the coming year.

By incorporating ESN's, we have the opportunity to:

- Capture more organizational knowledge that we otherwise wouldn't be able to
- Cultivate more collaboration and relationship building amongst our teams – especially in our virtual environments

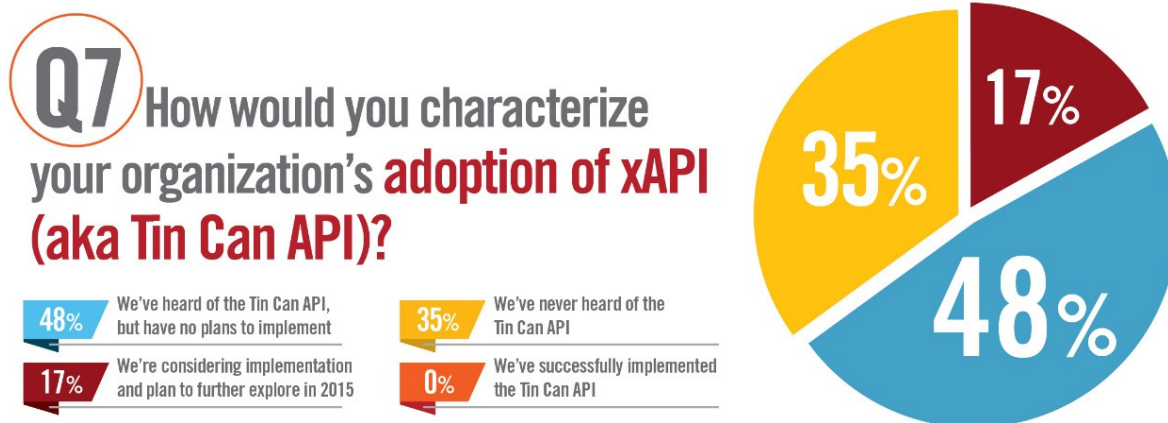
¹² <http://www.clomedia.com/articles/5790-is-social-networking-good-for-learning>

- Identify internal subject matter experts who are contributing value to the organization (49% of our survey respondents are using ESN's that allow for Q&A amongst co-workers)
- Access usage data that will allow us to improve learning offerings

It's also important to know the barriers to ESNs, such as technical implementation, integration with other in-house systems, user adoption, and metrics. Of those common barriers, user adoption is one element we as training professionals can most influence, followed next by metrics.

Below are some questions to consider, whether your organization is new to ESNs, or you have a level of maturity with your existing ESN.

1. What are the specific goals for the ESN tool?
2. How do you communicate those goals to your organization and leadership?
 - a. What are the benefits for various groups within the organization?
3. Where are you likely to encounter resistance points and how will you address them?
4. What are the best training methods for your learners and leaders to use the ESN?
 - a. How will those methods be incorporated into an overall training plan?
 - b. How will you engage your leadership in the process?
 - c. Who are your early adopters who can become ambassadors and potentially trainers on the ESN?
5. How might you have to tailor your communication and training plans, based on unique group requirements? (For example, how will sales teams use the ESN differently from IT teams?)
6. How will you gather and analyze measurement data, and then connect that measurement data to business goals and performance? (In our survey, only 11% of respondents currently using an ESN is conducting any type of analytics.)
7. What are your potential methods for ongoing sustainability and support?



This is another new survey question for 2015, as the Tin Can API continues to establish itself as the next generation of data gathering in learning technology – think of it as the modernization of SCORM. In reviewing our survey data, Tin Can is growing in recognition but it's clearly in the exploratory stages.

This next generation of SCORM will change the way we gather and analyze learning data; it will provide access to data beyond the traditional LMS, as well as provide more depth and meaning to the data – so that we can create better learning experiences within our organizations.

Whereas in the past we have been bound to the data residing only in the LMS for formal learning, this new technology will allow us to capture data points of both online and offline, plus formal and informal learning experiences.

What makes it even more powerful? It enables the capability of very different and disparate systems to securely communicate, by capturing and sharing this stream of activities using Tin Can's statement language. We now have a much broader picture of learning experiences.

For example, imagine being able to leverage data within your CRM that will help you to pinpoint specific training needs for your sales teams and directly affect behaviors that drive better opportunities. Or imagine being able to better leverage the data within your enterprise social network to offer better learning opportunities. Tin Can can help make that happen.

To learn more, we recommend the following:

- [“The Layers of the Tin Can Onion”](#) by industry expert Mike Rustici¹³.
- *Tin Can API Basics: Collecting the Learning Experiences that Matter*, webinar hosted by Impact Instruction Group and Watershed LRS:
<https://www.youtube.com/watch?v=LEyQnJoeMfI>
- Download the full Tin Can API specification [here](#).¹⁴

¹³ <http://tincanapi.com/the-layers-of-tin-can/>

¹⁴ http://www.adlnet.gov/wp-content/uploads/2013/05/20130521_xAPI_v1.0.0-FINAL-correx.pdf

About Impact Instruction Group

Founded in 2007, Impact Instruction Group is a leading corporate training and development firm. Impact Instruction focuses on custom training design and development for organizations' key strategic initiatives. Our core practice areas include:

- Curriculum plan design
- Systems training
- Mobile Learning
- E-Learning & Video
- Blended Learning
- Visual Design

The firm has won the APEX Award of Excellence in the categories of training design and one-of-a-kind education & training publications. Impact Instruction Group is based in Columbus, Ohio.

How to Contact Us

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