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Report: The State of Learning and Development in 2017

The State of Learning and Development 2017 Report consists of industry research received through survey responses of 459 L&D professionals.

"37% of trainers are on teams of 3 or fewer people"

"41% of trainers have more than 1,000 learners annually"

"The #1 LMS Complaint: Difficulty in updating and revising content"

"65% of L&D teams use technology for assessment"

"12% of L&D teams currently use animations"

"The average trainer is responsible for 4.75 functions."

"75% of trainers use webinars to stay up-to-date."

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Introduction: Ann McDonald

Director of Training, Mimeo

Learning and development is an exciting world of never ending change, challenges and trends. As you'll see in this year's State of L&D report, organizations are embracing blended learning, experimenting with new learning technology, and taking more time to evaluate the results of their training. Yet the report also shows that despite accelerating change, **there are a few things that remain constant in our world:**

1. We are on a never-ending quest to find new and better ways to **transfer learning and empower skill development** in the workplace
2. Training department pain points remain consistent through the years. In nutshell, **we are constantly lacking the big three – resources, time, and money.**

Learning and Development departments are lean, mean, and made up of roles in which the expectation is to wear many hats. The report shows that training professionals continuously need to **"do more with less"**, and therefore need to be **creative, tenacious** and **downright scrappy.** It is this spirit that yields some of the interesting outputs throughout the report, such as how we use learning technology, popular trends in learning delivery methods, and plans to implement new methodology in the upcoming year.

It should come as no surprise that this year's report does not show a trend toward a single "magic bullet" approach to learning transfer. Instead you will see the continued approach of leveraging blended learning and **creating an ecosystem** to provide learners with an appropriate mix of classroom training, just-in-time information on the job, and assessments to reinforce knowledge transfer and support ROI.

One of the exciting takeaways from this year's report is that **EVERYONE is now on-board with a blended approach to learning,** with the percentage of respondents jumping from 86% last year to 100% this year. This means we collectively recognize that for learning to be truly effective, it must be served up in a variety of ways and through a variety of methods and technologies.

Also, there's great news about the trends in learning technology. Although there are still some common pain points with technology such as traditional the traditional Learning Management System (LMS), there is in increase in **using existing technology in some new and different ways.** In the past, the emphasis on use of an LMS has been for the purpose of supporting a content library whereas this year, we are seeing an increase in more of the "behind the scenes" aspects of the content such as program design, testing, assessment, setting up a course module, and program delivery.

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It's great to see that L&D are professionals are not simply abandoning existing technologies for something newer, shiner or for the "app du jour", but are instead finding ways to be smarter in how they leverage what they have in place, and in some cases figure out how to enhance their legacy systems with complementary technology.

This approach to leveraging what you have in place is a great strategy for building value to future technology purchases. Here's a little advice for you: **one of the fastest ways to NOT get buy in or approval on future technology solutions is to complain about or underutilize what you currently have in place.** In looking at the Plans for the Future section of this report, there is some pretty interesting technology like **Artificial Intelligence** and **Virtual Reality** that you may want to leverage in the future, so now is the time to make sure you are getting what you can out of your existing platforms. However, if you are like me and the idea of adding Artificial Intelligence to your learning strategy any time soon leaves you feeling a little

overwhelmed, you'll be happy to know that the trends for this year's approach to **learning still has a strong preference for face-to-face learning, virtual learning and tools to facilitate social interaction and peer collaboration.**

Finally, I was thrilled to see this year's report include a glimpse at how WE, the learning professionals, go about learning. **It can be easy to overlook the development needs of the very people responsible for ongoing knowledge transfer.** However, we are fortunate to be in our roles in a time of abundant information readily available to us through so many resources such as webinars, blogs, and industry publications such as this State of Learning and Development report. In the spirit of being bonded together in our "do more with less" roles, read on, learn, collaborate, and keep finding and sharing your new and creative ways to transfer knowledge and empower development.

Introduction: Jennifer Hofmann

InSync Training

We're experiencing a period of evolution in learning right now. Thanks to the digital revolution, our organizations, our learners, and our jobs have changed dramatically. Confusingly, though, classrooms remain strikingly similar to those we learned in over 20 years ago. We know traditional approaches like multi-day workshops don't build skills efficiently. But our organizations change slowly, and prefer to operate in ways that worked in the past.

As we move away from an industrial economy to a knowledge economy, learning faces a number of challenging questions:

- Who are our modern learners?
- How do we improve our learning functions to support both our learner and organizational needs?
- What mode of delivery should we choose for effective modern learning experiences?

Before we can make a plan and move forward, we first need to understand the current state of learning and development. Mimeo and InSync Training joined forces to find answers.

This joint *State of Learning and Development 2017* report shares key information that we learned from you, modern learning practitioners, and provides guidance for using this information to take informed next steps.

Get more insights on this report by joining the State of L&D webinar with Jennifer Hofmann and Ann McDonald

State of Learning and Development and Trends

Before we dive into the data, let's establish some foundational knowledge upon which we're operating.

1. Our businesses (and learners) are global, mobile, and social.

Global businesses create diverse, dispersed workforces. As training professionals, we now support multi-cultural classrooms. To create globally supportive learning environments, the entire learning team must plan and understand the process and train to **generate desired outcomes.**

For most organizations, mobilization of employees and business represents a critical success factor. In an effort to support rapidly changing business needs, learning departments don't always have the time to **strategize appropriate mobile content** and implement its effective delivery.

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Today's employees collaborate with their peers on the job. Our learning must authentically support that way of working by incorporating the process into our programs. The essential shift in learning and development comes in understanding that our job is bigger than facilitating content. We teach our learners how to work productively and effectively in the workplace while participating in our learning environment.

2. We're moving from "Push Training" to "Pull Learning."

As we attempt to **adapt to the rapid digitization** of our workplaces, our learning culture evolves from traditional Push Training to more modern **Pull Learning**. We're aware that we need to make learning readily available to learners when and where they need it. And many of us make a concerted effort to provide that experience. This model marks a dramatic departure from the planned classroom training events of the past that pushed massive amounts of content to learners, whether they needed it immediately or not.

Check out the Glossary on page 45 for definitions of push vs pull learning.

3. Modern learners have unique characteristics we need to consider in our training programs.

In order to support modern learners, we have to understand what makes them tick and what motivates them to succeed or disengage. Bersin by Deloitte[1] research taught us a lot about our learners, and when we combine that perspective with Adult Learning Theory[2], our understanding becomes more comprehensive. For example:

- Learners are overworked, impatient, and overwhelmed in their day-to-day roles. Focused, supported, and easy learning counteracts this reality.
- Learners, like our organizations, are mobile and social. Our learning programs should be available when they're on the move, and supportive of collaboration when appropriate.
- Learners bring experience into the classroom. When we honor that experience and embrace their contributions to our training content, while also minimizing lecture, we encourage lasting performance improvement.
- Learners are relevancy and goal-oriented, and have a deep desire to perform well. We can increase learner engagement by clearly defining the value of training content and events to our audience. Furthermore, when we set expectations for performance and participation in our learning programs, we help our learners succeed, motivating them even more.

4. Blended learning is big.

When we review the current state of business and the mindset of learners, we recognize that a single learning delivery methodology can't possibly prepare learners to meet organizational needs. **We need to move towards blended programs.** We define[3] blended learning as:

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"A formal instructional treatment that involves matching content to the most appropriate delivery technology (at the learning objective level) and sequencing the resulting lessons, activities, and assessments into a complete program of instruction. In academic settings, this often features a combination of face-to-face interaction and distance learning."

Organizational learning adapted this model by teaching individual learning objectives through authentic treatments that value learners' time. Many corporate blended learning programs include **virtual classroom sessions, self-guided eLearning modules, in-person training, and performance support resources.**

Blended learning's value is three-fold:

    i.   It allows the learning department to deliver content in the most effective, appropriate, authentic way based on the defined learning outcomes.

    ii.   Learners have the opportunity to leverage valuable, vetted resources back on the job when they need additional support.

    iii.   Businesses invest in training programs that better equip employees while also addressing organizational needs.

Despite the value of blended programs, **organizations hesitate to implement them.** Why? Designing instruction is more complicated, the implementation period is long, and the costs are higher than with traditional classroom training.

Learning professionals now have the added responsibility of advocating for this modern method of design, proving the value to stakeholders and learners, and managing the change to this model.

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[1] See cited sources: *"Meet the Modern Learner."*

[2] See cited sources: "Virtually There: Making Virtual and Blended Work for Adult Learners"

[3] See cited sources: "Virtually There: Virtual Classrooms, Blended Learning, Microlearning…"

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Part I:

Overview

449 Learning Professionals Take a Survey

In our second annual State of L&D Report, Mimeo and InSync Training partnered to once more find out what the learning and development (L&D) world is thinking about, in terms of **challenges, technology, and looking towards the future.**

The State of Learning and Development 2017 Report consists of industry research received through survey responses of **449 L&D professionals from 12 countries,** including all of the G-8. Business sizes ranged from single proprietorship training consultancies to large transcontinental corporations with presences in dozens of countries.

Industry

Respondents classified themselves into one of twelve industries. Of these, five (Military, Healthcare, Financial, Manufacturing, and K-12) were classified as "Heavily Regulated" in a further attempt to assess the role of L&D in fulfilling operating and regulatory requirements. The typical "Heavily Regulated" market sector is larger than 1,000 employees, whereas the smaller organizations (< 100 personnel) were consultancies, L&D service providers, and non-profits.

INDUSTRIES THAT ANSWERED THIS SURVEY

- Military
- Higher Education
- K-12
- Government
- Non-Profit
- Corporate Training
- Retail Trade
- Wholesale Trade
- Information Publishing
- Business Consulting
- Manufacturing
- Financial Services
- Healthcare
- Technology and Software

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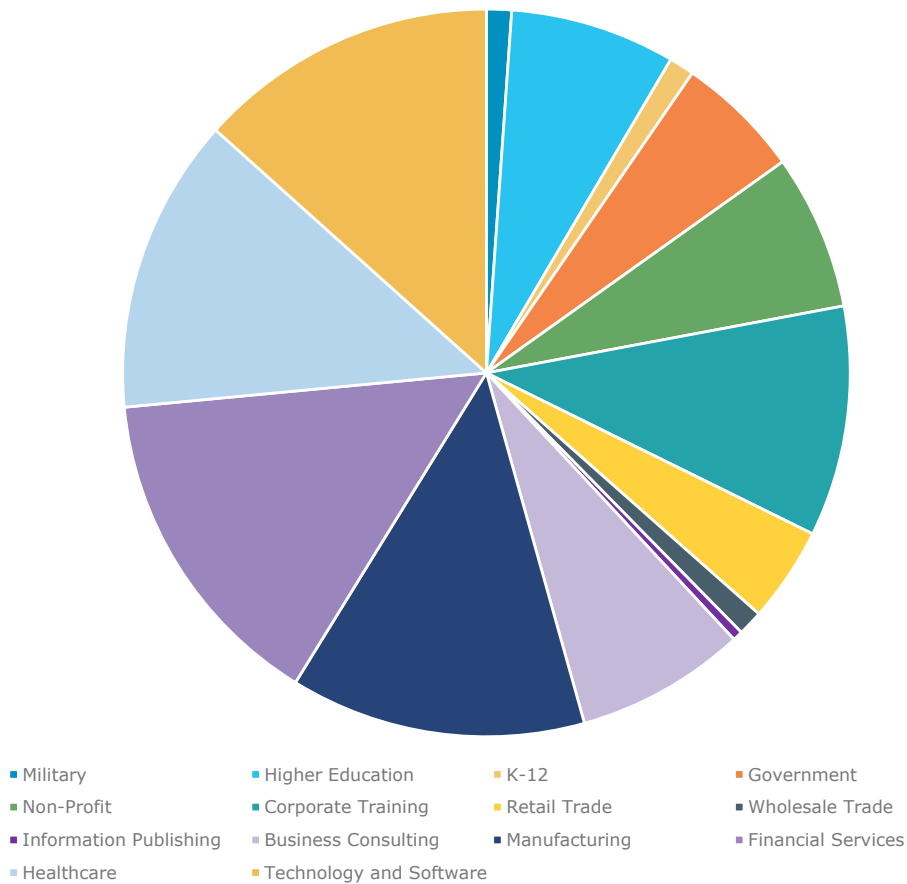
Organization Size

Nearly half (46%) of respondents worked for an organization of over 1,000 personnel. The principal industries in this category were Finance, Healthcare, Manufacturing, and Technology.

COMPANY SIZE

Category	Percentage
1-50 Employees	15%
51-100 Employees	5%
101-500 Employees	19%
501-1000 Employees	15%
>1000 Employees	46%

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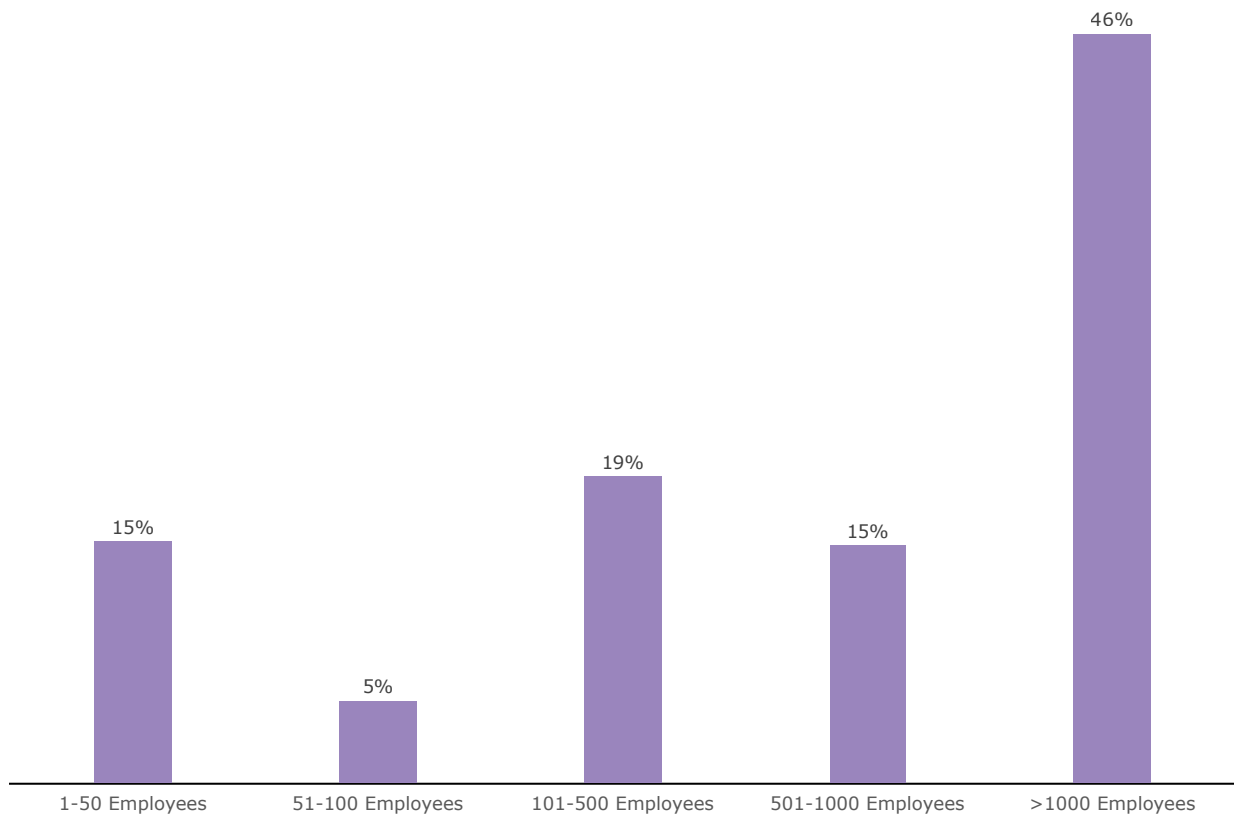
Training Department Size

The typical training department across all responses was less than 10 personnel, and more than half of those worked in a department of three or less. In 2016, the smallest bracket was 1-10 employees, and 59% of L&D teams reported they were 10 or fewer people. This year, we broke it down into smaller subsections of either 1-3 team members or 4-10. A total of **71% of L&D teams are fewer than 10 people, and 37% are on teams of 3 or fewer people.**

TRAINING DEPARTMENT SIZE

1-3	4-10	11-50	51-100
37%	35%	17%	4%

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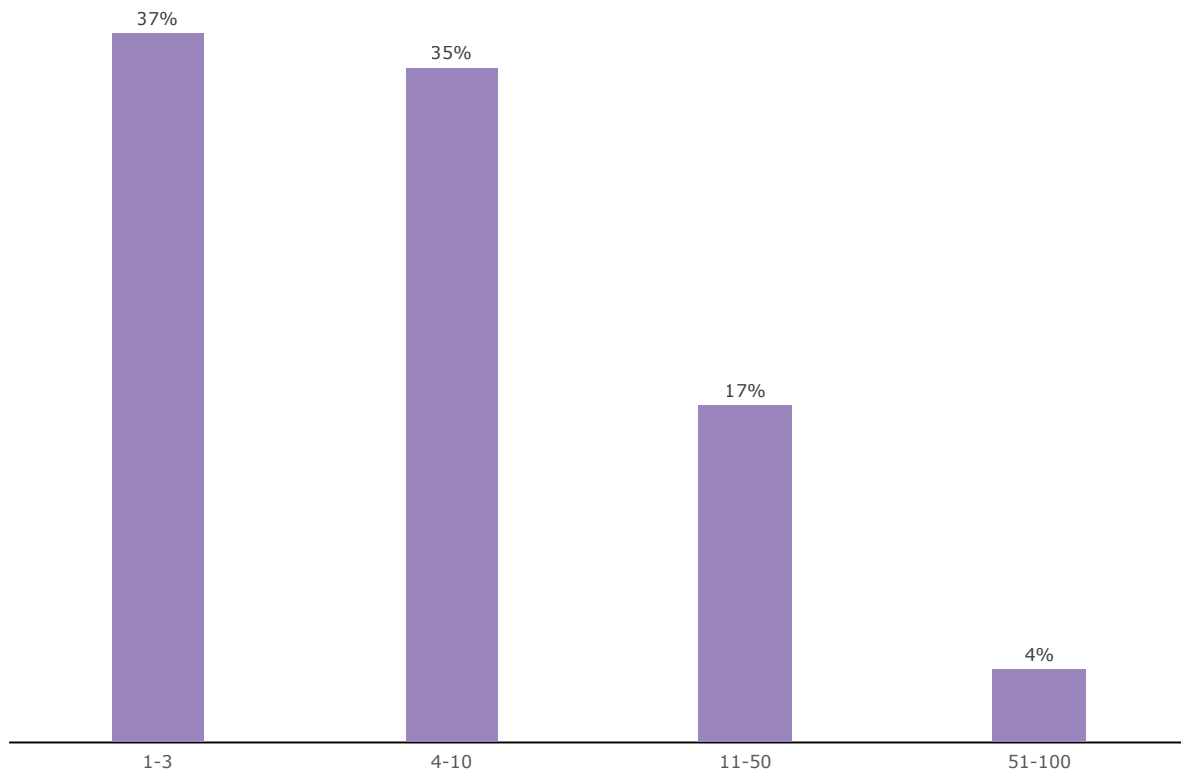
Internal vs. External Training

Once again, the **majority of our respondents provide internal training** for their organization. This was true across most industries, even in Manufacturing, indicating that most training is treated as an organizational cost for workforce development or compliance, rather than as a business offering or market-distinguishing aspect of product or service delivery. Business Consulting was the exception, as their business is serving external service needs.

INTERNAL VS EXTERNAL TRAINING

External: 35% (2017), 30% (2016)
Internal: 65% (2017), 70% (2016)

Legend: 2017, 2016

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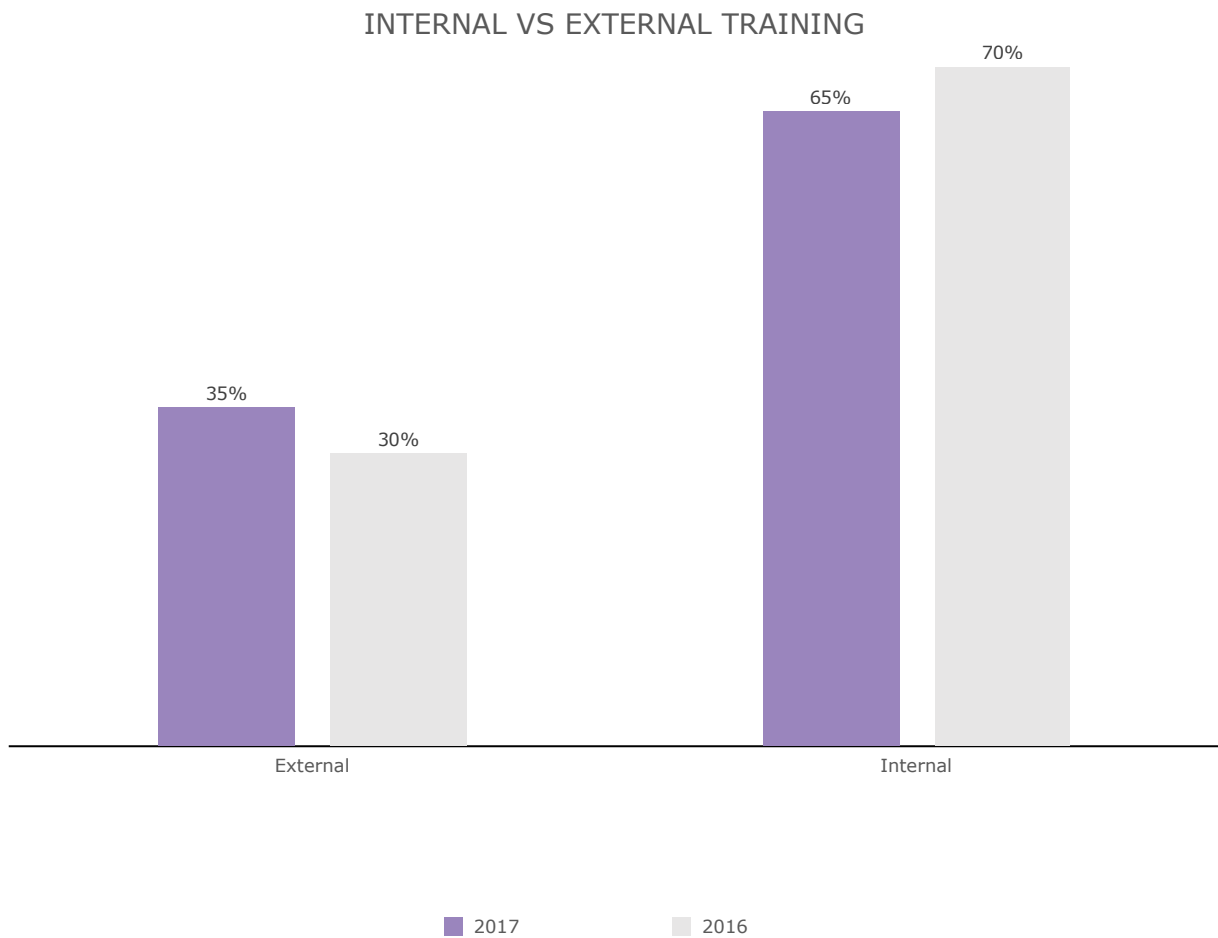
This year, we also asked the external providers what kind of training they provide. It was split almost evenly between training a customer on their product and training ordered by a client.

WHAT KIND OF EXTERNAL TRAINING DO YOU PROVIDE?

47%

53%

- Training a customer on our product
- Training ordered by a client
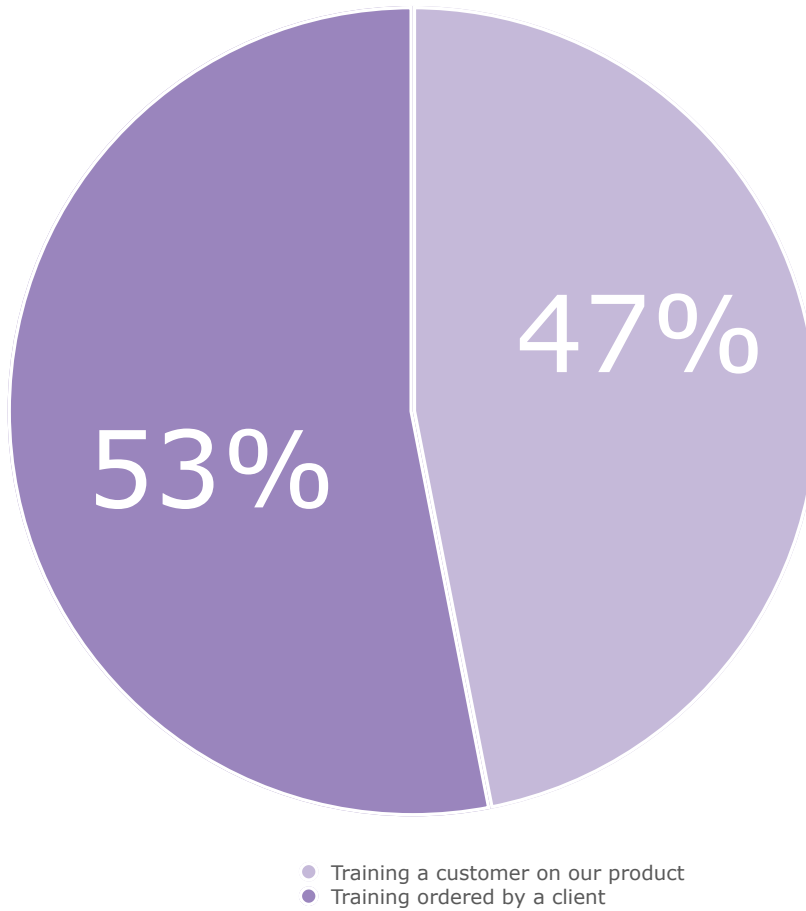
Go in-depth with Jennifer Hofmann and Ann McDonald on the implications of this report by watching the State of L&D webinar

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Part II:

Analysis

Learning Challenges

In 2016, we found that L&D's top challenges included the small size of teams and the lack of time and budget to do what is necessary. For the most part, these remain top challenges in 2017 as well.

The Average Trainer Fulfills 4.75 Functions

In 2016, we grouped respondents into various training "roles" based on what they reported as their main responsibilities. This year, we broadened the options for what could be a responsibility to find out even more deeply what different training roles do. In analyzing individual response data for tasking and responsibilities, respondents were sorted and analyzed for relationships between the "types" of tasks/roles identified. Instead of identifying their titles and making assumptions, we sought to find out what the **underlying perceived tasks were within each role** as identified by the respondent (one person's instructional designer is not another's).

Each respondent selected from up to 15 functions, which we then grouped using associations indicated by frequency and strength of the "relationship" between any two or more functions. Once again, we found that most **training professionals are responsible for fulfilling more than one role.**

Role: Training Designer
Functions:
- Designer
- Creator
- Curator
- Strategist
- Project Manager
- Learning Architect

Role: Delivery
Functions:
- Facilitator
- Trainer
- Instructional Designer
- Subject Matter Expert (SME)
- Social Moderator
- Producer

Role: Supervisor
Functions:
- Project Manager
- Director
- Manager
- Strategist

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The average training professional is responsible for 4.75 functions. Most notably, those that included "Instructional Designer" as a function were most likely to identify multiple functions, with an average of 6.4 functions.

The single most frequently selected function was "Facilitator." Of them, most also identified as "Trainer" (not surprising, as these functions are very similar and differentiation is largely a function of terminology). However, of interest was that of those that identified as "Facilitators", most also identified as "Instructional Designer."

Many of those involved with the delivery of instructional design also identified as "Subject Matter Experts." More than half of respondents identifying as "Trainers" also identified as SMEs, reflecting a larger trend within the industry to leverage in-house technical talent to develop their internal workforce.

WHAT FUNCTIONS ARE YOU RESPONSIBLE FOR?

Function	%
Facilitator	56%
Trainer	53%
Designer	51%
Creator	43%
Project Manager	41%
Subject Matter Expert	35%
Manager	33%
Builder	32%
Strategist	27%
Learning Architect	27%
Producer	22%
Curator	21%
Director	20%

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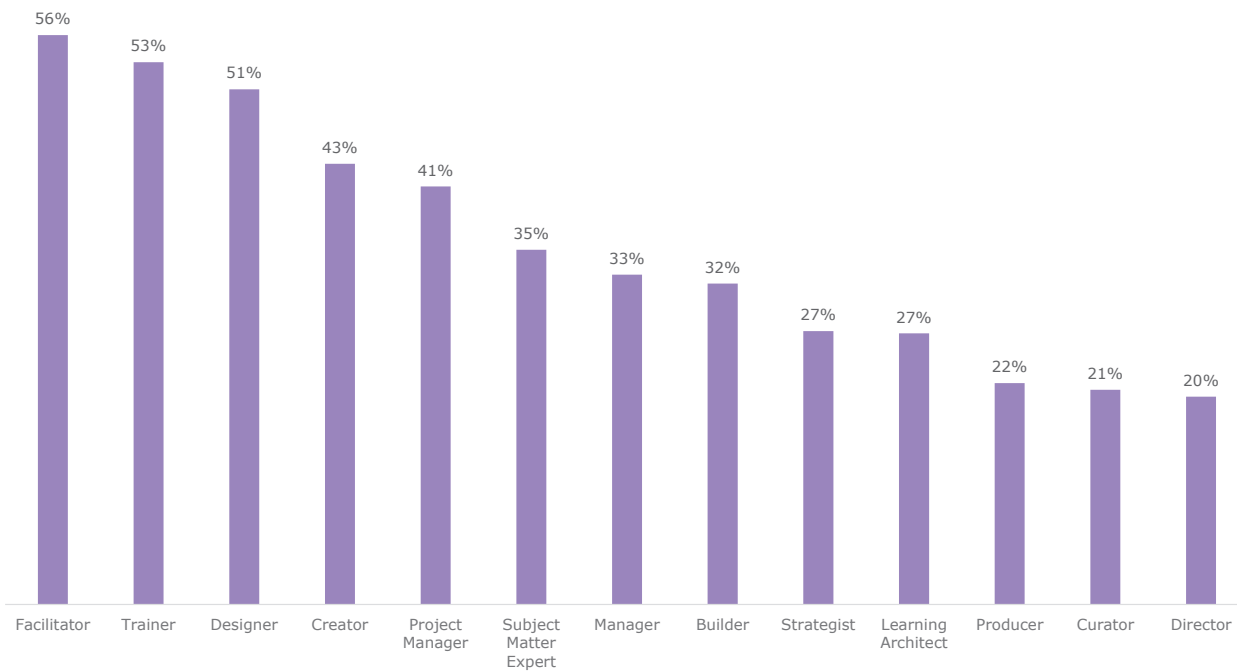
Does Department Size Matter?

We established in our State of L&D 2016 report that training teams are usually lean mean machines. In fact, whereas last year 59% of teams were less 10 people or fewer, this year 71% of teams have fewer than 10 people, with 37% of teams consisting of only 1-3 professionals.

TRAINING DEPARTMENT SIZE

37%	35%	17%	4%
1-3	4-10	11-50	51-100
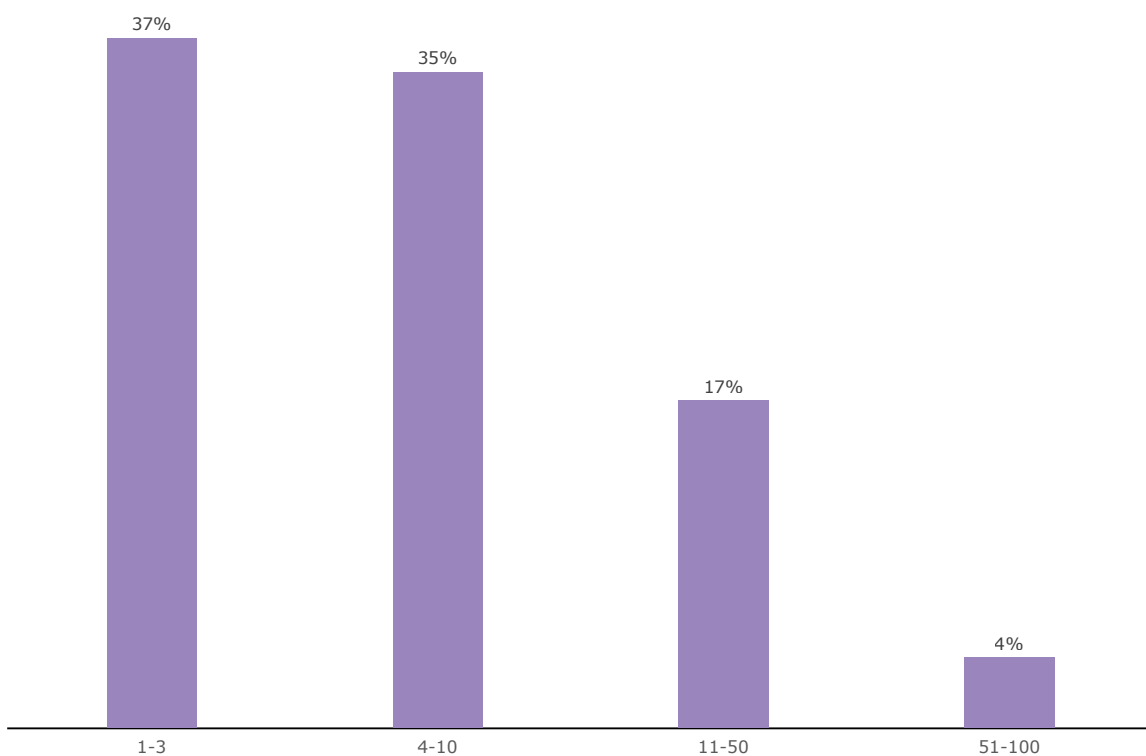
So how do you get lucky and find a training team with more than 10 members?

Company size is not a good factor to look at. **Internal training department size is not particularly well-correlated with organization size.** While this reflects that organizations are not investing in people resources for an official training department, it could also indicate that training is pocketed within larger departments rather than being separated into a central function. Of the small and mid-size (up to 1,000 personnel) organizations surveyed, training department size typically consisted of 4-10 full-time personnel.

Industry may have something to do with department size. Within "heavily regulated" sectors, average training department size was significantly larger, controlling for overall size of the organization.

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However, **the best way to spot a large training department is whether they offer blended learning.** Respondents who reported they use multiple instructional delivery methods and who provided advanced definitions of blended learning tended to belong to larger training departments.

41% of Trainers Serve 1000+ Learners Annually?

When it comes to the number of learners for which each team is responsible, not much has changed since last year. Once again, 41% of respondents provide training for an audience of over 1,000 learners; on the flip-side, 25% are responsible for an audience of 100 learners or fewer.

TRAINING AUDIENCE SIZE
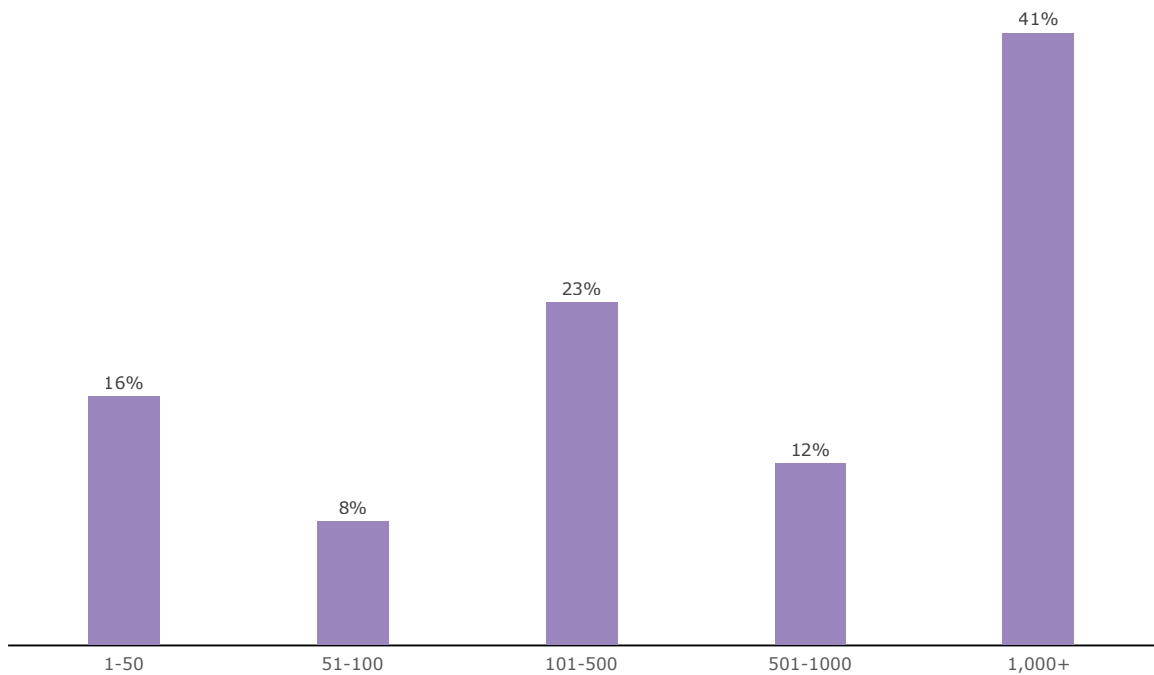
Training audience size was not well-correlated with organizational size overall, but large organizations are much more likely to have a training audience of greater than 1,000.

That said, large organizations almost exclusively develop training solutions for internal use only, whereas all other organizations reported a nearly even mix of training that was developed for internal and external audiences.

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Top Challenge: Lack of Time and Budget

Most industries agree on the **top challenges to L&D:**

1. **Time and resources** to conduct L&D in workforce
2. **Demonstrating ROI** of an L&D program
3. **Budget and logistical constraints** placed on L&D

WHAT IS YOUR TOP CHALLENGE?
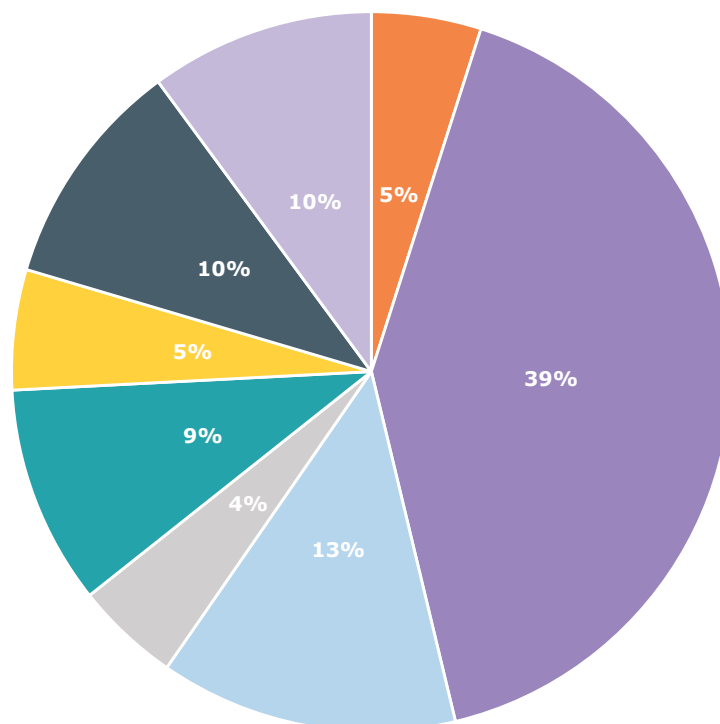
- Alignment of Goals
- Resource Constraints (Budget, Time)
- Skill Development of Team
- SME Coordination
- Demonstrating ROI
- Technology Integration
- Mgmt Buy-In
- Learner Buy-In

However, among highly regulated industries (Healthcare, Military, Finance), L&D challenges are largely directed at alignment of L&D programs with the objectives and requirements.

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L&D Challenges: Internal vs External

The top learning challenge reported by internal trainers was once again **budgetary constraints**, followed closely by **time constraints**. From there, the most reported challenges include **getting buy-in** from both executives and learners, **demonstrating ROI,** and **building skills of the training department.**

INTERNAL TRAINING CHALLENGES

18%	Budgetary constraints
17%	Time constraints
10%	Obtaining executive management buy-in
10%	Obtaining learner buy-in
9%	Demonstrating the ROI of training
8%	Building the skills of the training department to match modern learning needs

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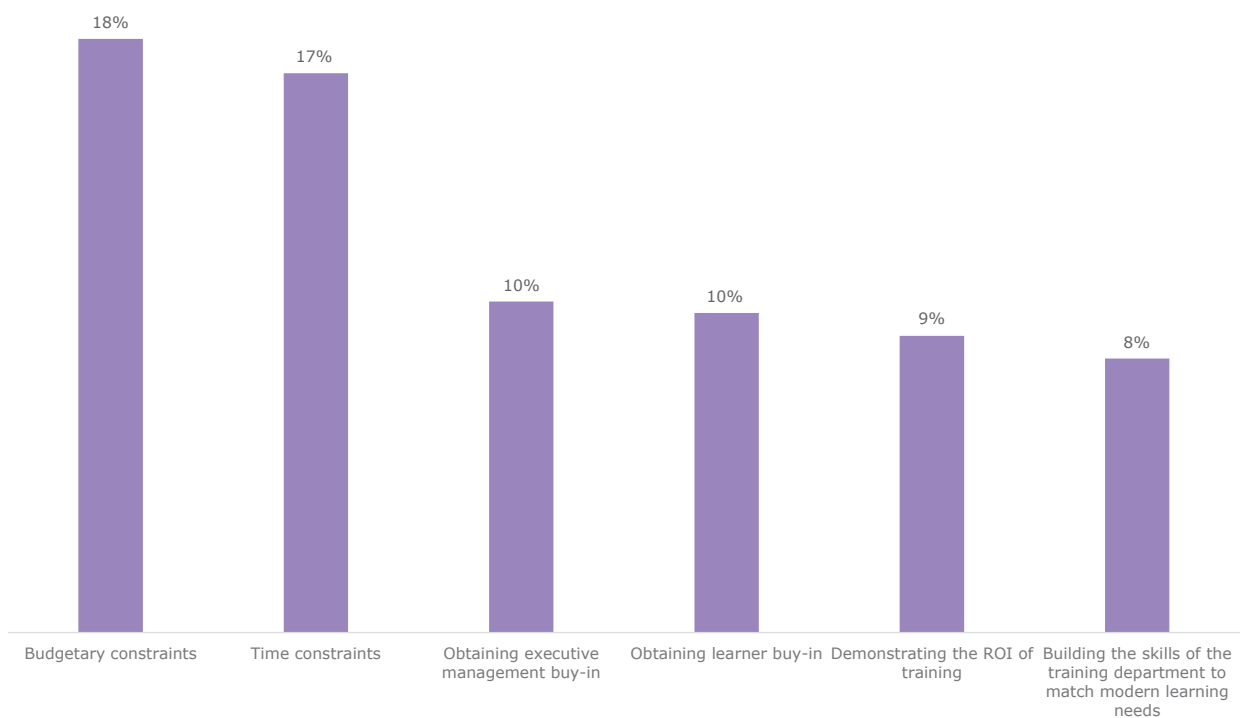
While the external trainers mostly agreed with these top challenges, they also reported **logistics as a major pain point.**

EXTERNAL TOP TRAINING CHALLENGES

Bar chart values:
- Budgetary constraints — 16%
- Time constraints — 14%
- Demonstrating the ROI of training — 10%
- Obtaining executive management buy-in — 10%
- Obtaining learner buy-in — 10%
- Training program logistics — 8%
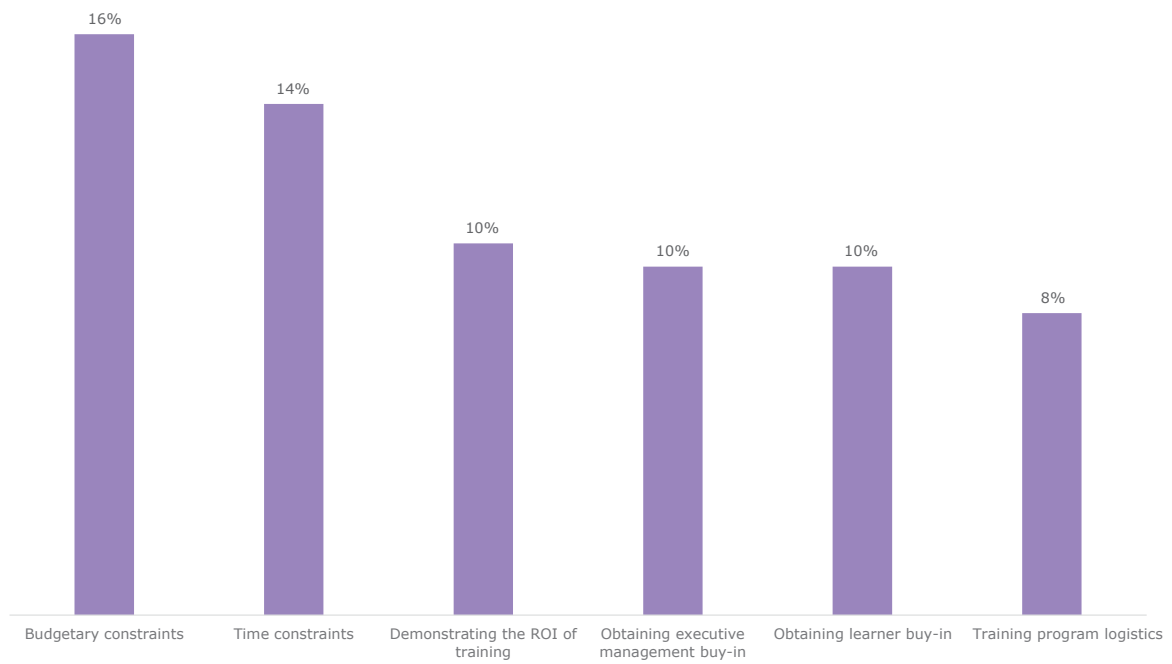
Learn more about how to tackle learning challenges with the State of L&D webinar.

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Learning Technology and You

Learning technology is nearly ubiquitous, with over 98% of respondents reporting some use of learning tech. Taking into consideration the lack of time and personnel in the training world, it only makes sense that L&D teams would leverage technology to more smoothly administer training.

Whereas in 2016, teams most commonly used their technology as a **content library,** this year the top uses lined up differently. The top 5 uses for learning technology in 2017 all facilitate the logistics and mechanics of courses: **assessment, program delivery, program design, testing,** and **setting up a course module.**

WHAT DO YOU USE YOUR LEARNING TECH FOR?

Use	Percentage
Assessment	65%
Program Delivery (i.e. webinar or virtual classroom)	58%
Program Design (i.e. scheduling and registration)	54%
Testing	47%
Setting up a course module	46%
Content creation	46%
Reporting and analytics	45%
Attendance	44%
Content distribution	42%
Content library	39%
Brand/intellectual property content security	15%
We don't use any learning technology	6%
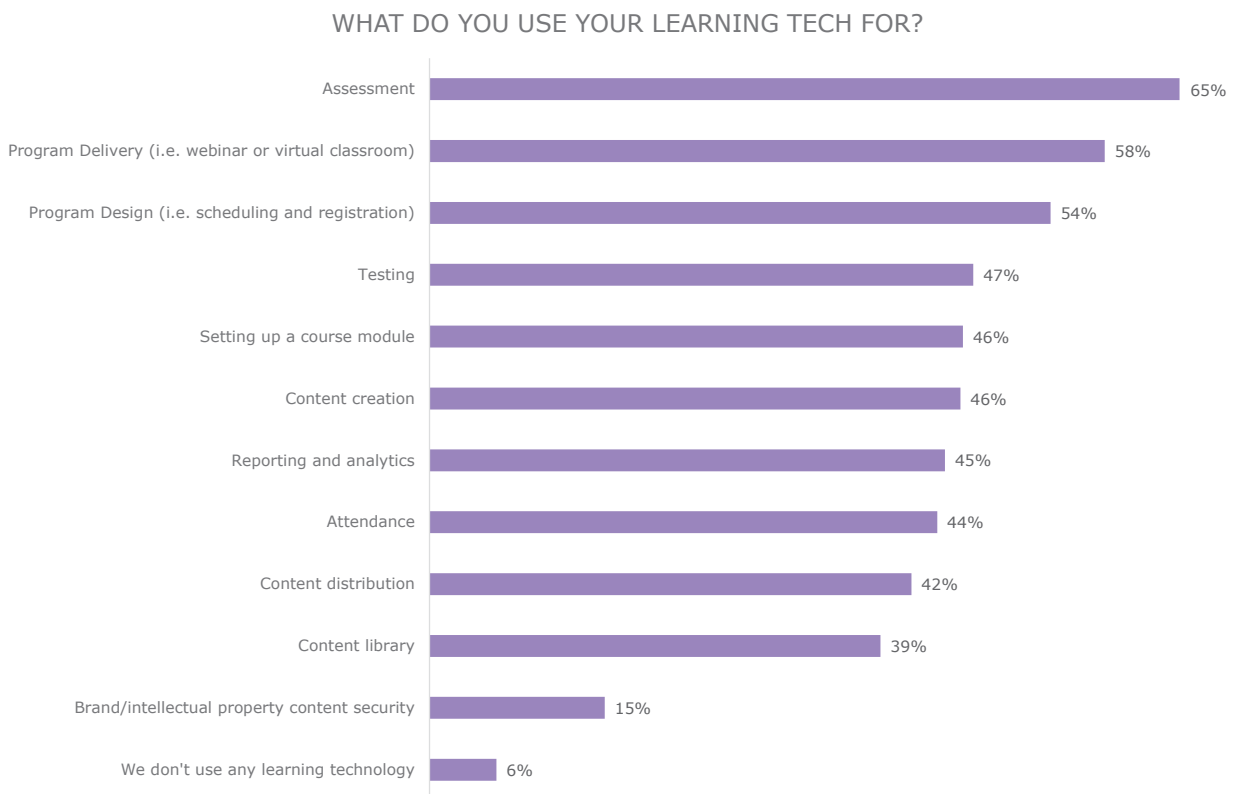
Check out the Glossary on page 45 for definitions of these uses.

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While this was largely the same across industries, government teams reported **program delivery** as their number one use; non-profit and retail trade teams use their tech primarily for **program design;** and corporate training teams ranked **setting up a course module** in their top four uses.

LEARNING TECH USE BY INDUSTRY

Legend:
- Assessment
- Attendance
- Brand/intellectual property content security
- Content creation
- Content distribution
- Content library
- Program Delivery (i.e. webinar or virtual classroom)
- Program Design (i.e. scheduling and registration)
- Reporting and analytics
- Setting up a course module
- Testing
- We don't use any learning technology

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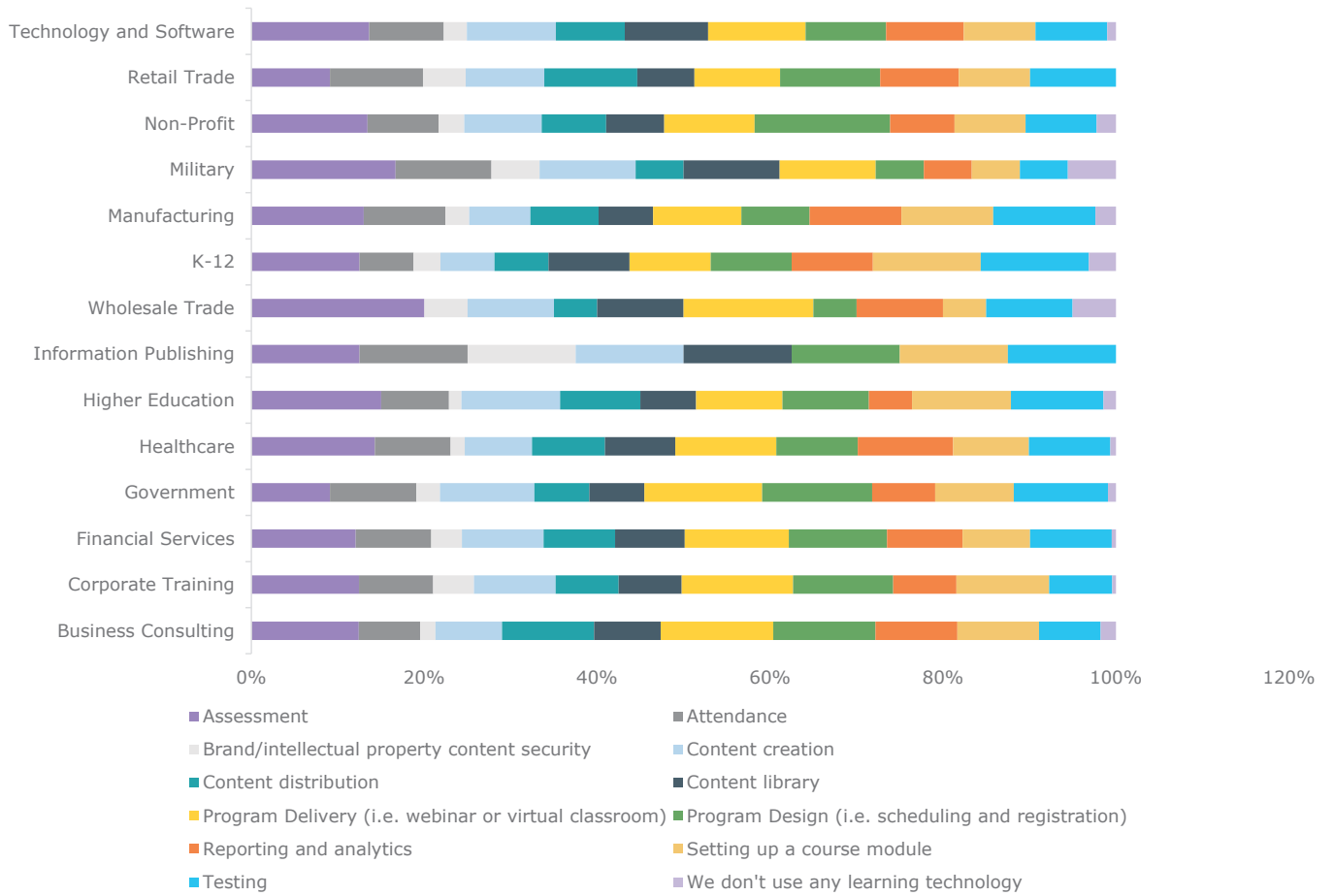
Meanwhile, teams from different company sizes leverage their learning technology differently. Teams under 100 employees use their tech first and foremost for **program design** and are also more likely to report that they **don't use any learning technology.**

LEARNING TECH USE BY COMPANY SIZE

Legend:
- Assessment
- Attendance
- Brand/intellectual property content security
- Content creation
- Content distribution
- Content library
- Program Delivery (i.e. webinar or virtual classroom)
- Program Design (i.e. scheduling and registration)
- Reporting and analytics
- Setting up a course module
- Testing
- We don't use any learning technology

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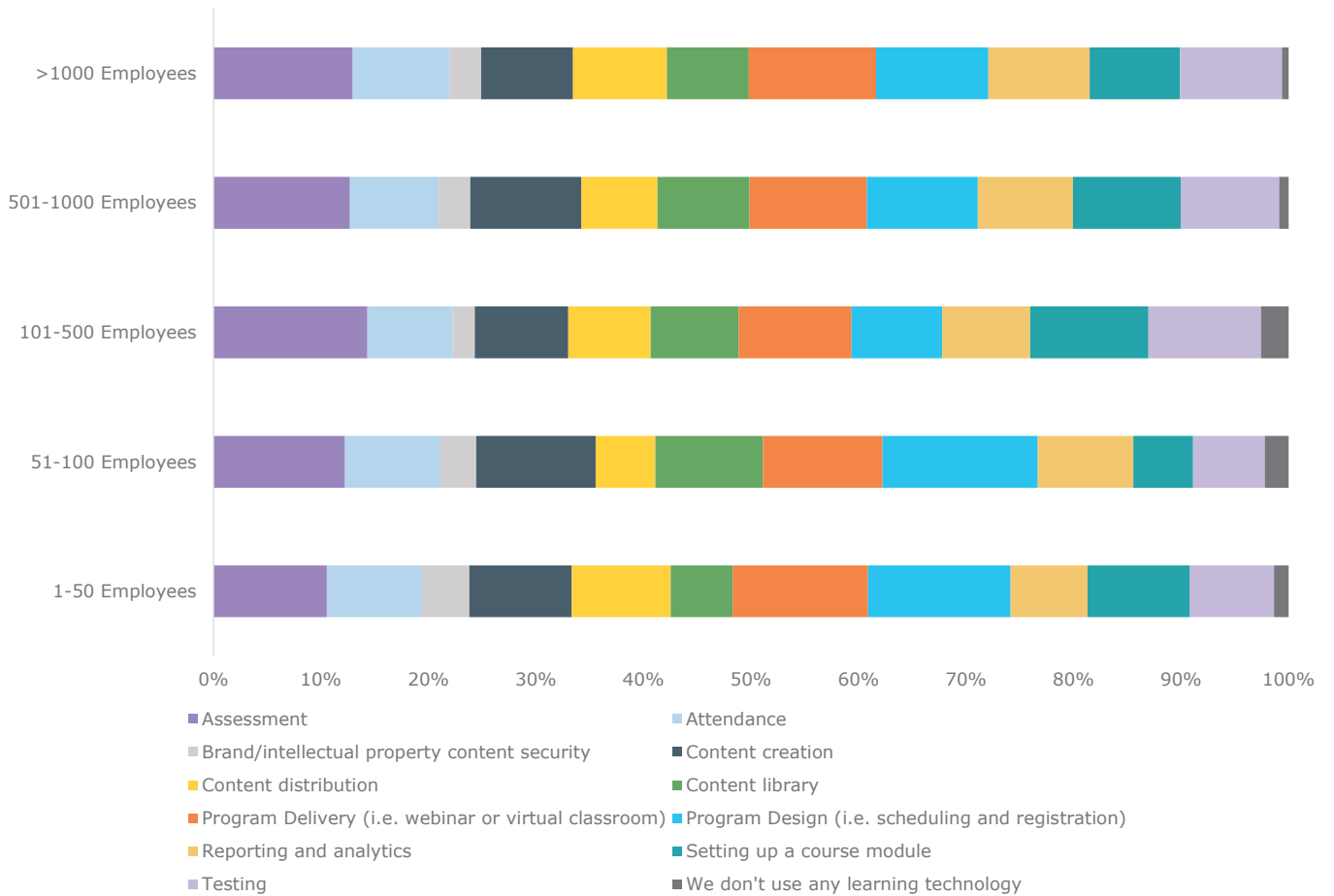
The State of Learning Management Systems

The learning management system (LMS) is perhaps the most common learning technology. **67% of 2017 respondents report using an LMS** (down from 70% in 2016), including the majority of external training providers. While an LMS is less common in smaller companies, 42% of companies with 1-50 employees reported using an LMS, up from 38% in 2016.

LMS USE BY COMPANY SIZE

Overall	>1000 Employees	501-1000 Employees	101-500 Employees	51-100 Employees	1-50 Employees
67%	80%	71%	58%	48%	42%
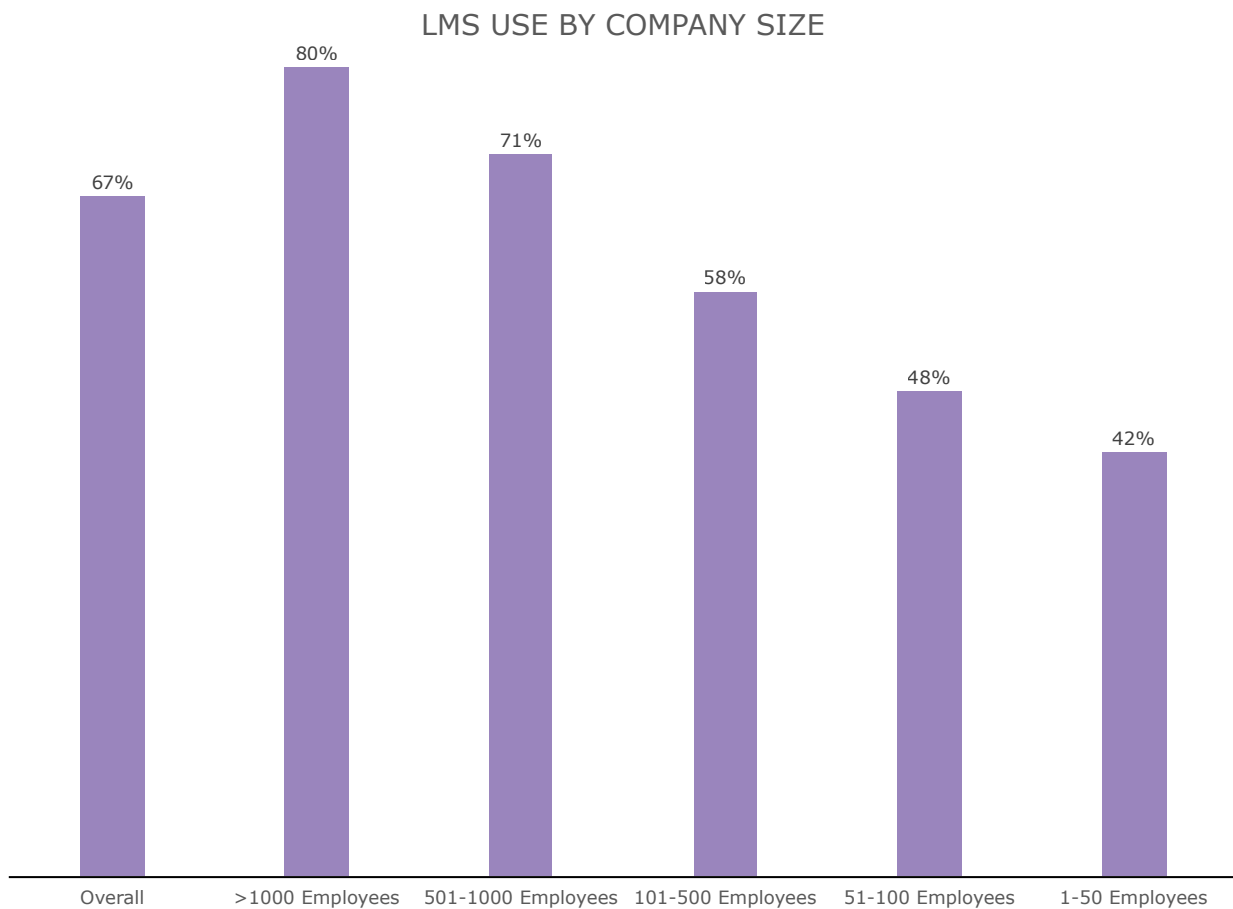
Check out the Glossary on page 45 for the Blended Learning Hub definition of an LMS.

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Since the LMS is groaned about around the corporate learning world, we asked for each respondent's top complaint with their system. While many of the top 5 complaints were the same as in 2016, the priority differed. In fact, the number one complaint this year, which is the **difficulty in updating and revising content,** didn't even rank in the top 5 last year.

TOP LMS COMPLAINTS

Complaint	2017	2016
Difficult to Update/Revise Content	35%	39%
Limited Tracking and Reporting	35%	32%
Limited Social Learning	33%	47%
Inability to Integrate With Enterprise Software	32%	41%
Poor End-User Experience	31%	45%

■2017 ■2016

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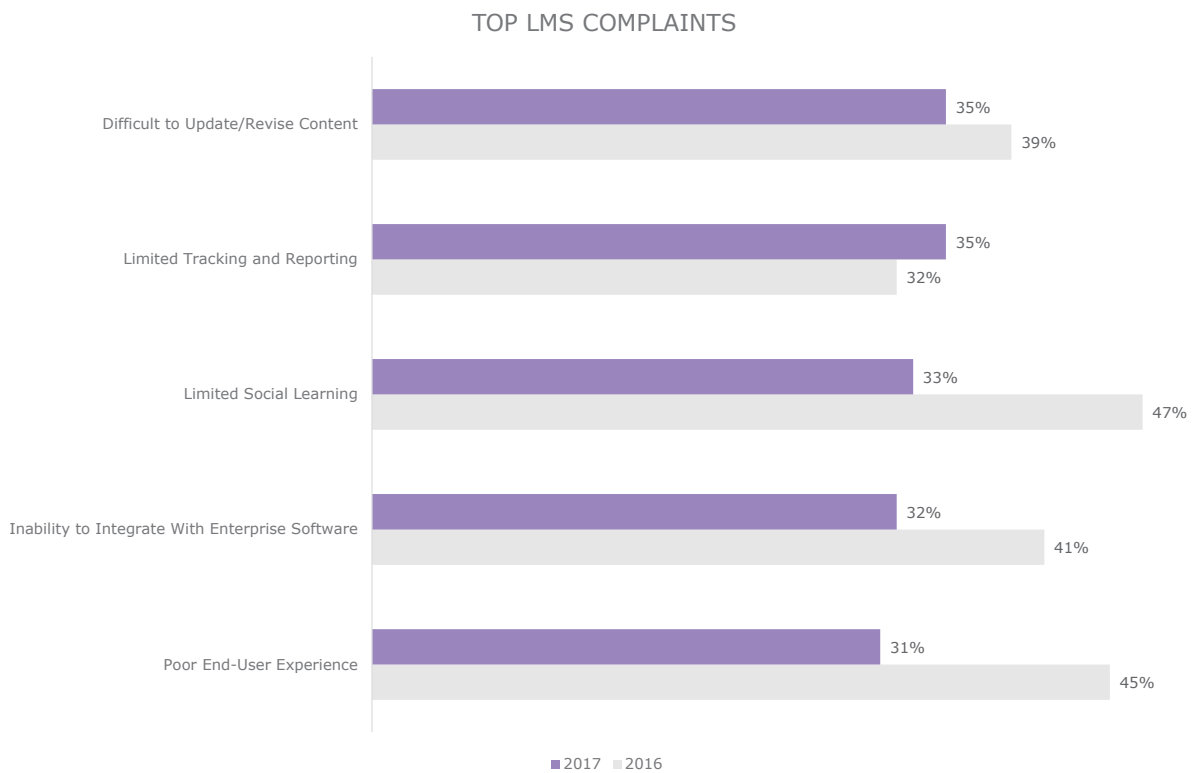
The top LMS pain point varies depending on industry. Business consulting teams, who are most likely to service external clients, are most concerned about the **poor end-user experience** while corporate training, healthcare, and wholesale trade teams complained about the **ongoing maintenance** required by an LMS. In the heavily regulated sector, financial services and military reported **inability to integrate with other enterprise software** as a major problem, while healthcare, manufacturing, and financial services are frustrated by how difficult it is to **update and revise content.**

LMS PAIN POINTS BY INDUSTRY

- ■ Customer support
- ■ Doesn't allow learners to "pull" content at their convenience
- ■ Inability to integrate with other enterprise software
- ■ Lengthy implementation
- ■ Limited tracking and reporting
- ■ None
- ■ Other
- ■ Unclear terminology
- ■ Difficult to update/revise content
- ■ Getting employee buy-in
- ■ Inflexibility
- ■ Limited social learning
- ■ No blended (print and digital) approach
- ■ Ongoing maintenance
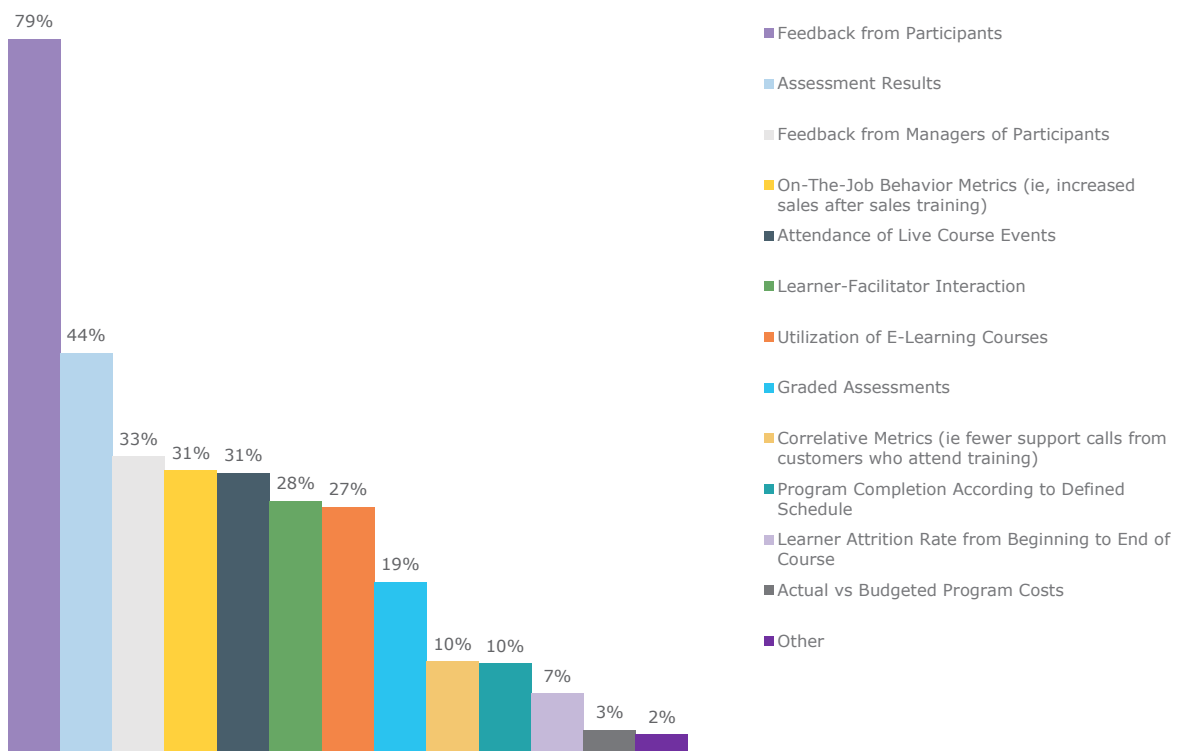- ■ Poor end-user experience

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Is This Even Doing Anything? Evaluation and Measurement

In 2016, we found a general lack of strategy for measuring and evaluating the success of training. This year, we asked respondents to identify from a drop-down menu which - if any - key performance indicators they monitor to measure success. Nearly all respondents (99.5%) collect at least one measure relating to the training development and delivery process. Of those reporting that data collection is conducted, nearly all (99.8%) report using at least two measures or methods of evaluation and measurement of their learners and training program.

__Read Mimeo's in-depth report on how learning teams measure their training with Spotlight Report: Training Measurement 2017.__

The most common method of evaluation is collecting **feedback from participants,** at 79%. Far behind this are **assessment results** and **feedback from managers of participants.**

EVALUATION METHODS OVERALL

- Feedback from Participants
- Assessment Results
- Feedback from Managers of Participants
- On-The-Job Behavior Metrics (ie, increased sales after sales training)
- Attendance of Live Course Events
- Learner-Facilitator Interaction
- Utilization of E-Learning Courses
- Graded Assessments
- Correlative Metrics (ie fewer support calls from customers who attend training)
- Program Completion According to Defined Schedule
- Learner Attrition Rate from Beginning to End of Course
- Actual vs Budgeted Program Costs
- Other

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While participant feedback is ubiquitously the most popular feedback method, across different industries, the other methods vary. L&D practitioners in heavily regulated industries use multiple measures, including assessment, correlating performance metrics, and completion/attrition data as part of the data collection and evaluation regimen. Business consulting, higher education, military, and non-profits all rely heavily on **attendance of live course events** as a measure of success; retail trade and technology look to **utilization of eLearning courses.** Only government and non-profit teams reported that **actual vs. budgeted program costs** metrics play any importance in their measurement.

EVALUATION METHODS BY INDUSTRY

- Actual vs Budgeted Program Costs
- Assessment Results
- Attendance of Live Course Events
- Correlative Metrics (ie fewer support calls from customers who attend training)
- Feedback from Managers of Participants
- Feedback from Participants
- Graded Assessments
- Learner Attrition Rate from Beginning to End of Course
- Learner-Facilitator Interaction
- On-The-Job Behavior Metrics (ie, increased sales after sales training)
- Other
- Program Completion According to Defined Schedule
- Utilization of E-Learning Courses

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Meanwhile, larger companies of more than 501 employees rely more heavily **on on-the-job behavior metrics** and **utilization of eLearning courses** while companies of 1-50 employees reported **learner-facilitator interaction** and **attendance of live course events** as key performance indicators.

EVALUATION METHODS BY COMPANY SIZE

Legend:
- Actual vs Budgeted Program Costs
- Assessment Results
- Attendance of Live Course Events
- Correlative Metrics (ie fewer support calls from customers who attend training)
- Feedback from Managers of Participants
- Feedback from Participants
- Graded Assessments
- Learner Attrition Rate from Beginning to End of Course
- Learner-Facilitator Interaction
- On-The-Job Behavior Metrics (ie, increased sales after sales training)
- Other
- Program Completion According to Defined Schedule
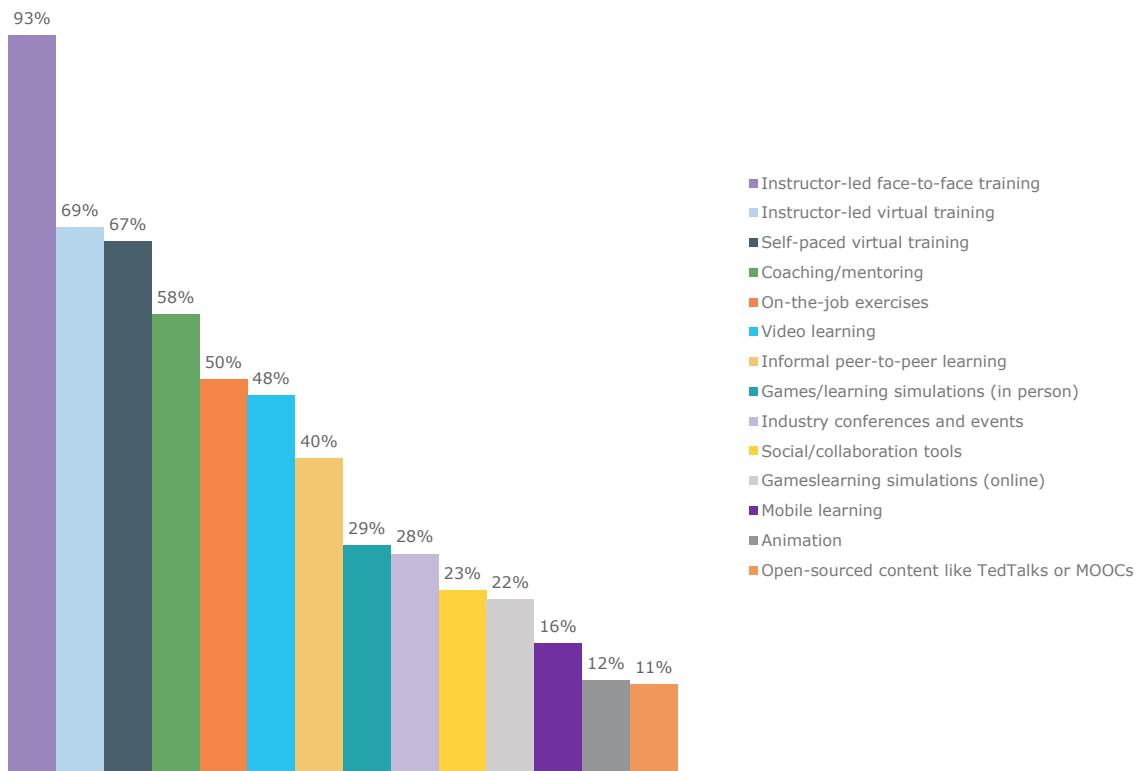- Utilization of E-Learning Courses

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Most Popular Learning Trends

No "state of the industry" report would be complete without an examination of trends. In this section, we asked respondents to identify what training modalities they currently use and what they plan on implementing in the next year. In 2016, we found the most popular training mode was **face-to-face learning** followed by **instructor-led virtual training** and **self-led virtual training**. As for what they planned to implement in the next two years, there were three top responses: **self-led virtual training, video learning, and social/collaboration tools.**

The results in 2017 are almost exactly those from 2016: Traditional face-to-face is the predominant instructional delivery method in all industry sectors, with 93% of respondents reporting that they use face-to-face instructor-led training (down from 94% in 2016). However, **no respondents rely exclusively on face-to-face training.**
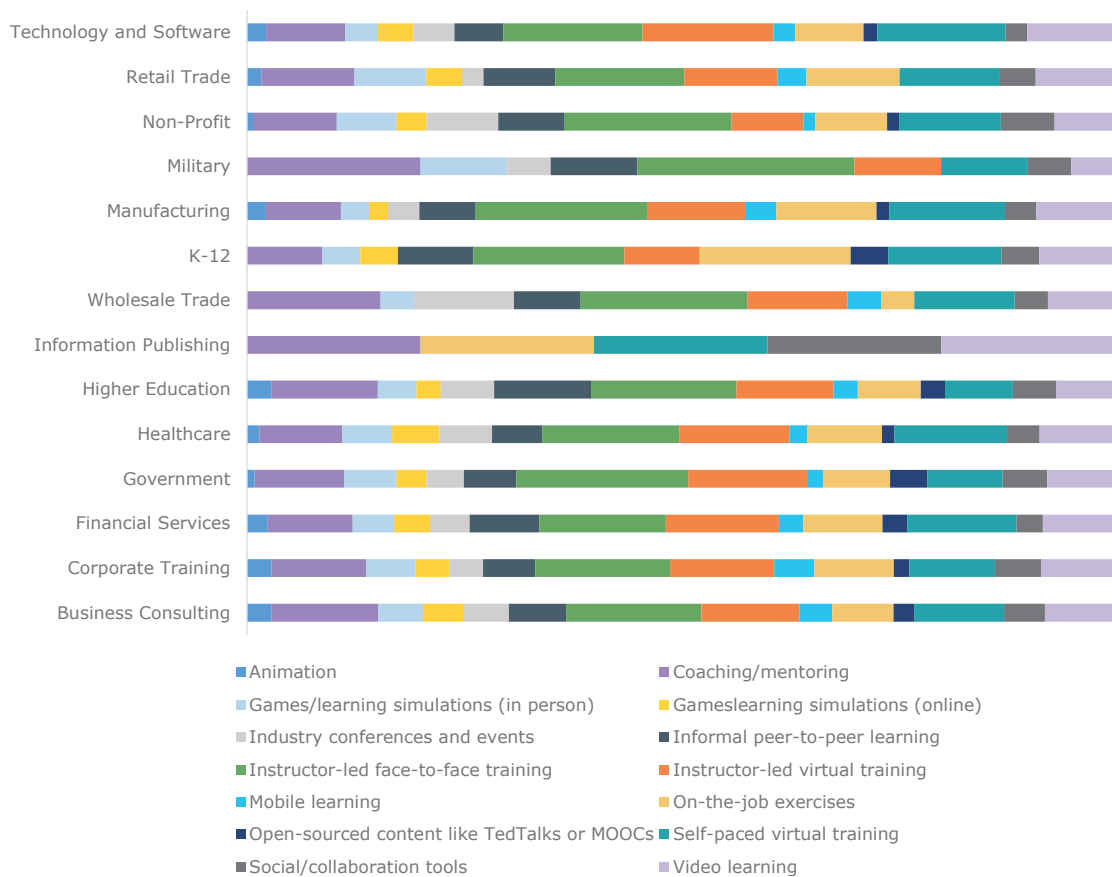
MOST POPULAR TRAINING MODES

- ■ Instructor-led face-to-face training
- ■ Instructor-led virtual training
- ■ Self-paced virtual training
- ■ Coaching/mentoring
- ■ On-the-job exercises
- ■ Video learning
- ■ Informal peer-to-peer learning
- ■ Games/learning simulations (in person)
- ■ Industry conferences and events
- ■ Social/collaboration tools
- ■ Gameslearning simulations (online)
- ■ Mobile learning
- ■ Animation
- ■ Open-sourced content like TedTalks or MOOCs

Check out the Glossary on page 45 for definitions of these learning trends.

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There is not much variance across industries, though military, higher education, and wholesale trade all ranked **coaching/mentoring** in their top 3 modalities. K-12 also relies heavily on **on-the-job exercises.** The military is most likely to use **in-person game/learning simulations,** while **animation** is most popular in business consulting, corporate training, and higher education (though in all cases, it was still ranked in the bottom two).

Heavily regulated industries were far less likely to deliver instructional solutions to virtual learners, although this may represent a more fundamental co-location characteristic of that workforce.
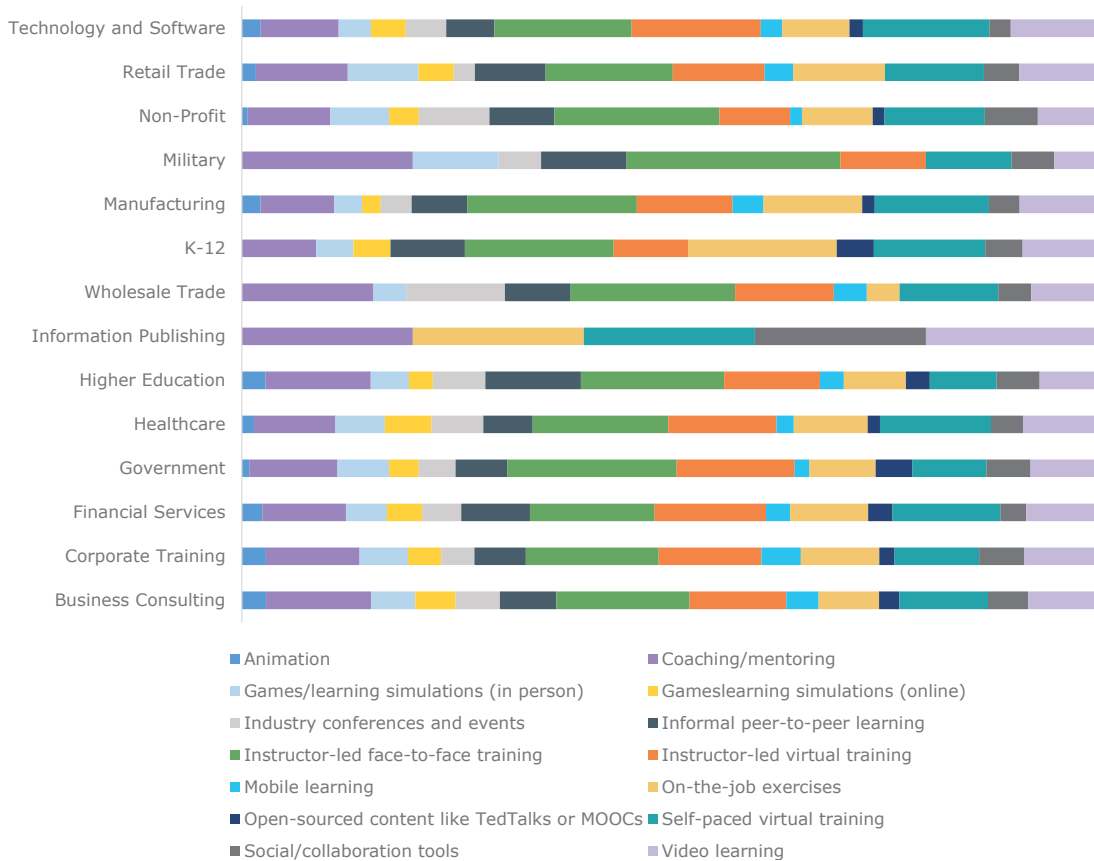
LEARNING MODALITY BY INDUSTRY

Legend:
- Animation
- Coaching/mentoring
- Games/learning simulations (in person)
- Gameslearning simulations (online)
- Industry conferences and events
- Informal peer-to-peer learning
- Instructor-led face-to-face training
- Instructor-led virtual training
- Mobile learning
- On-the-job exercises
- Open-sourced content like TedTalks or MOOCs
- Self-paced virtual training
- Social/collaboration tools
- Video learning

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In organizations with >1000 employees, nearly half (45.79%) of L&D departments have a **coaching/mentoring** program, compared with the average 10.44% in smaller companies. In contrast, companies with 51-100 employees are the least likely to have a coaching/mentoring program, with only 3.37% reporting that as a current training mode.

When it comes to more experimental technologies, the large organizations are the most likely to employ them. 25.25% of organizations with >1000 employees use i**n-person games/learning simulations,** 18.18% use **online games/learning simulations,** and 9.09% use **animation.**

LEARNING MODALITY BY INDUSTRY

- ■ Animation
- ■ Coaching/mentoring
- ■ Games/learning simulations (in person)
- ■ Gameslearning simulations (online)
- ■ Industry conferences and events
- ■ Informal peer-to-peer learning
- ■ Instructor-led face-to-face training
- ■ Instructor-led virtual training
- ■ Mobile learning
- ■ On-the-job exercises
- ■ Open-sourced content like TedTalks or MOOCs
- ■ Self-paced virtual training
- ■ Social/collaboration tools
- ■ Video learning

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In 2016, 86% of respondents identified that they employ blended learning, meaning they employed at least one mode of a "non-tech" training (such as face-to-face training, coaching/mentoring, informal peer-to-peer learning, or on-the-job exercises) and one mode of "tech" training. This year, **100% of respondents use blended learning,** even if that is simply combining video learning with face-to-face training.

Find out more about what these learning trends mean by watching the State of L&D webinar with Jennifer Hofmann and Ann McDonald.

Looking Ahead

In 2016, most of our respondents planned to implement **self-led virtual training, virtual learning,** and **social/collaboration** tools. This year, we asked respondents to identify which learning trends - identified by eLearning Industry[4] and Bottom Line Performance[5] - they plan to put into practice this year.

Nearly the majority of respondents plan to use **video and interactive videos** in 2017. This was followed closely by **content distribution** and **microlearning.**
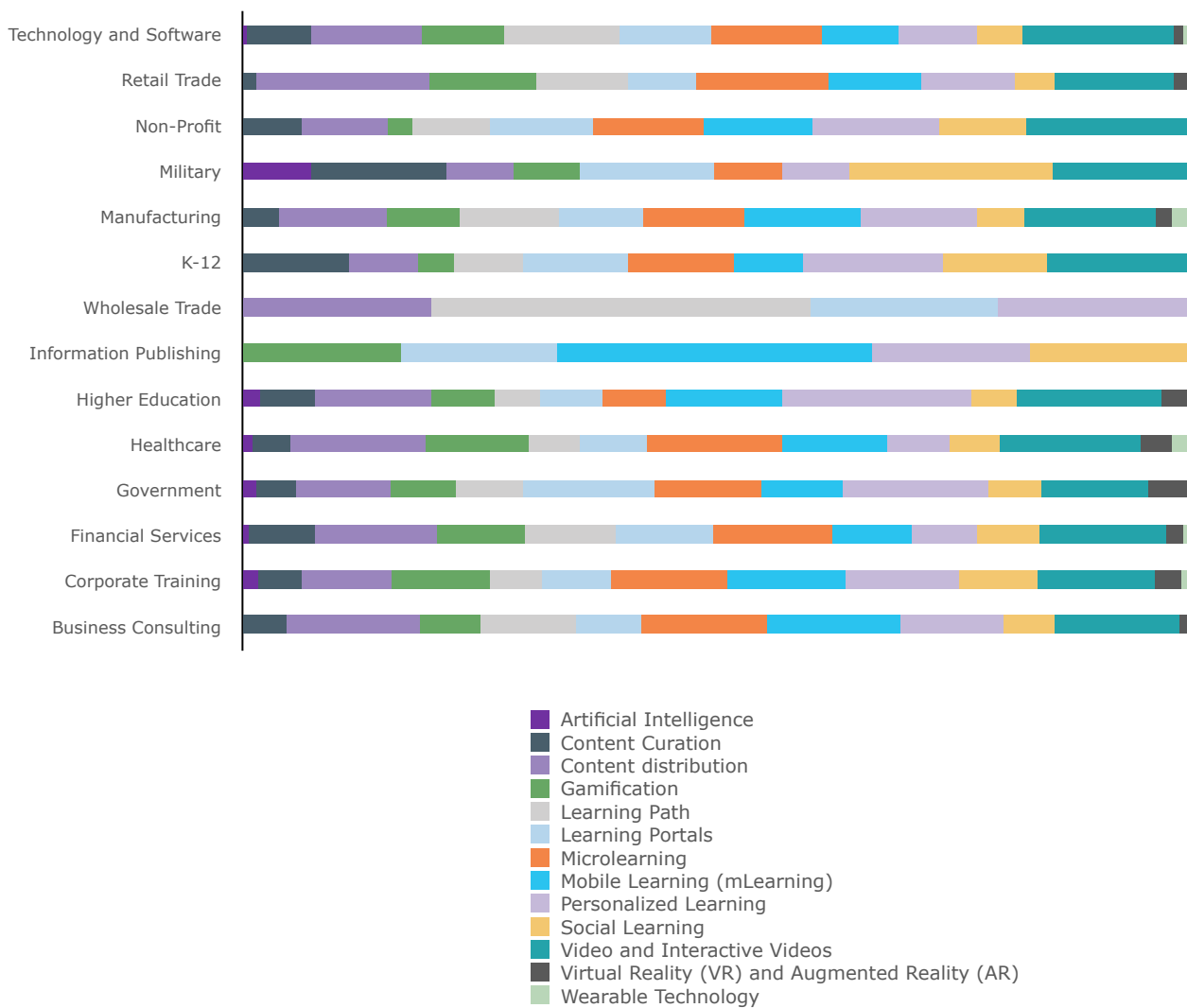
WHAT LEARNING TRENDS WILL YOU IMPLEMENT IN 2017?
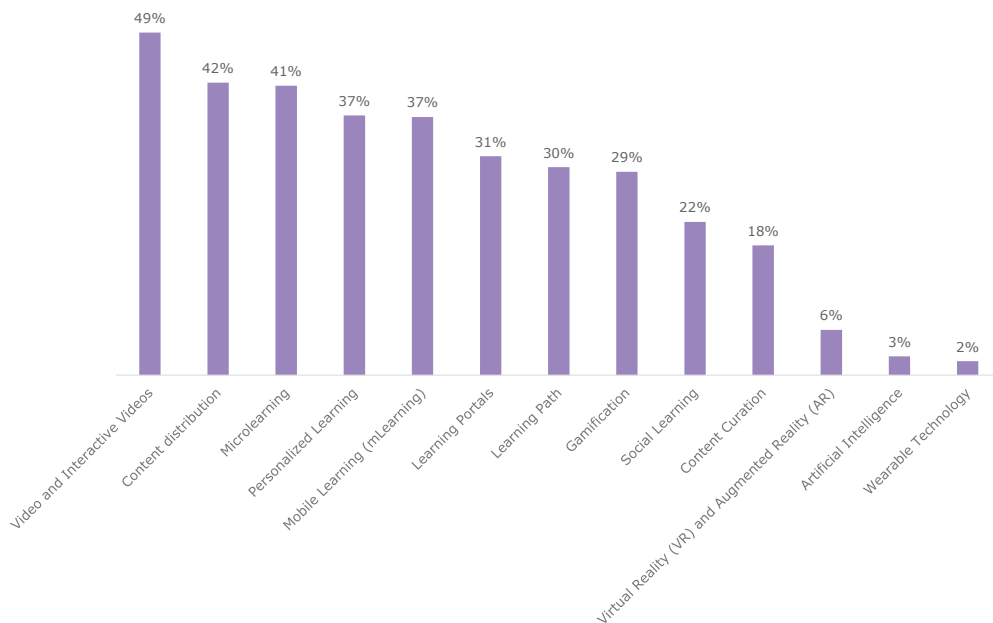
Check out the Glossary on page 45 for definitions of these learning trends.

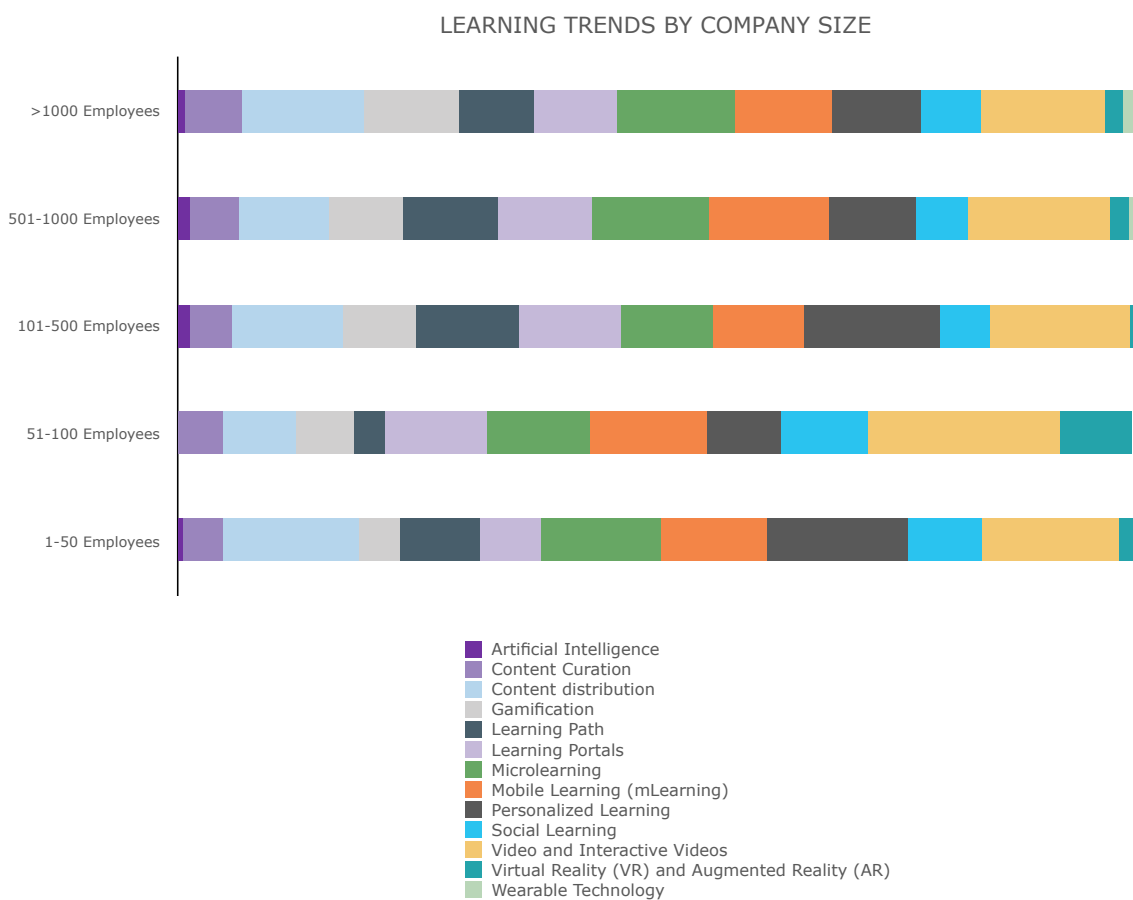[4]See cited sources: "Top 10 eLearning Trends to Watch"

[5]See cited sources: "Seven 2017 Learning Trends: Novel or Norm?"

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Business consulting ranked **mobile learning (mLearning)** as their number one roll-out this year, while government, higher education, K-12, and nonprofit industries are focusing on **personalized learning.** The least popular learning trend for 2017 is **wearable technology,** followed by **artificial technology.** Government and healthcare are the most likely to be rolling out **virtual or augmented reality** with 4.23% and 3.30% respectively ranking it as a plan for 2017.

LEARNING TRENDS BY INDUSTRY

Legend:
- Artificial Intelligence
- Content Curation
- Content distribution
- Gamification
- Learning Path
- Learning Portals
- Microlearning
- Mobile Learning (mLearning)
- Personalized Learning
- Social Learning
- Video and Interactive Videos
- Virtual Reality (VR) and Augmented Reality (AR)
- Wearable Technology

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Companies with 1-50 employees ranked **personalized learning** as their top priority in 2017, while companies with 51-100 and 501-1000 reported **mobile learning (mLearning)** is in their top 3, replacing **content distribution**. Meanwhile, companies with 501-1000 employees are the most likely to implement experimental technologies such as **artificial intelligence** and **virtual or augmented reality.**
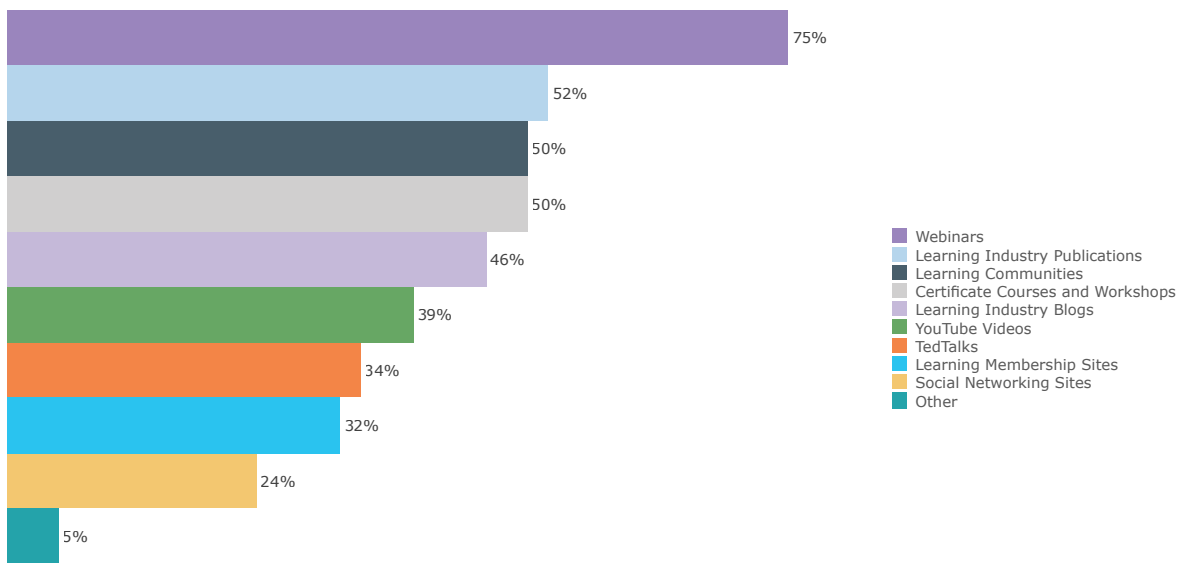
LEARNING TRENDS BY COMPANY SIZE

Legend:
- Artificial Intelligence
- Content Curation
- Content distribution
- Gamification
- Learning Path
- Learning Portals
- Microlearning
- Mobile Learning (mLearning)
- Personalized Learning
- Social Learning
- Video and Interactive Videos
- Virtual Reality (VR) and Augmented Reality (AR)
- Wearable Technology

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L&D for L&D

In this year's research, we introduced a new question: **what resources do you use to build your own or your team's skills?** Our intent was to find out if training professionals practice what they preach and how they take responsibility for their own learning.
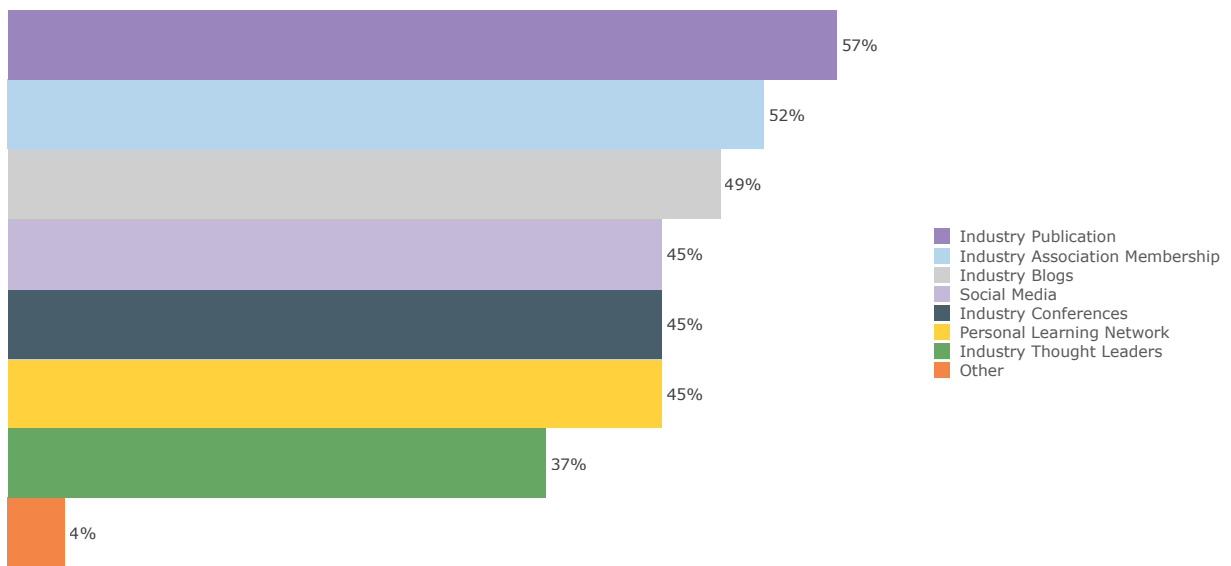
The number one resource for L&D learning is **webinars,** with 75% of respondents reporting that they use webinars to build skills. Other resources they reported include **learning industry publications, certificate courses and workshops, and learning communities.**

HOW DO YOU/YOUR TEAM BUILD SKILLS?

Resource	Percentage
Webinars	75%
Learning Industry Publications	52%
Learning Communities	50%
Certificate Courses and Workshops	50%
Learning Industry Blogs	46%
YouTube Videos	39%
TedTalks	34%
Learning Membership Sites	32%
Social Networking Sites	24%
Other	5%

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We also asked respondents to tell us how they keep up-to-date on industry news and best practices. The majority rely on **industry publications, industry association memberships,** or **industry blogs** as their sources.

HOW DO YOU STAY UP-TO-DATE ABOUT L&D?

- Industry Publication — 57%
- Industry Association Membership — 52%
- Industry Blogs — 49%
- Social Media — 45%
- Industry Conferences — 45%
- Personal Learning Network — 45%
- Industry Thought Leaders — 37%
- Other — 4%

As far as how different training functions behave, Instructional Designers felt the most compelled to stay abreast of new technologies, techniques, and practices in learning and development. SME and managers placed the least importance on new developments in these areas.

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Conclusion

Jennifer Hofmann

InSync Training

The survey taught us a lot about the state of learning and development and confirmed a number of assumptions we believed true about our learners and learning environments. For example, our respondents informed us that:

- **In-house Subject Matter Experts have become part of their learning teams** and are developing the workforce.
- **Time and resources limit professional development** opportunities for these practitioners.
- Almost all of their organizations **use more than one training methodology,** even heavily regulated businesses like government agencies.
- Large organizations, though, more frequently **expect multi-delivery method training.**
- Regardless of their organization's size, most L&D professionals have similar roles and responsibilities.
- Those surveyed demonstrated their organizations are using at least two methods of evaluation to determine the success of programs.

This data and that from other industry research only has value if we use it to move the profession forward and make a point to create better learning experiences for our learners.

Blended learning provides a viable solution.

Adopting and excelling at blended learning requires a culture change before investing in new technologies. Learners and stakeholders have to believe that blended learning will work and improve upon the status quo. L&D must manage that change while simultaneously designing effective blended learning.

How do we do that? Through a purposeful approach.

Step 1: Identify the current state of your organization.

Before designing and implementing a new blend, consider the internal attitude your organization has to this approach. Organizations can be in one of four stages: denial, resistance, exploration, and commitment. Where does your organization fall?

- **Denial.** If your team feels like blended learning is a passing fad, or your stakeholders believe blended learning won't work as well as traditional training, your organization is in the denial stage. Combat denial by keeping learners and stakeholders informed, and encouraging participation in the blended learning program.
- **Resistance.** Learning team members may resist the transition to blended learning, fearing that their existing skills will become outdated. Learners and managers may perceive that the change is unnecessary. As you lead the change process, remember that you can't force acceptance. Rather, listen to vocalized concern, empathize, and provide answers to any questions that arise.
- **Exploration.** When the conversation around blended learning becomes more universally positive, but full commitment hasn't been reached, your organization is in the exploration phase. Take advantage of enthusiasm and build momentum towards the change by answering questions and comment about the learning process and potential outcomes.

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- **Commitment.** Not everyone will commit to blended learning at the same time, but eventually you'll reach a point of "business as usual" for the learning team. Celebrate the day you hear "I can see where this fits" and "Can I use this approach for another project?" Never stop looking for back pedaling on the change curve if a program or event doesn't go as expected.

Step 2: Adopt a modern learning mindset.

Experts like Jane Hart[6] agree that a modern learning mindset creates a partnership between L&D and the business, by supporting organizational learning wherever and whenever it takes place. This approach involves a change for our learning team.

We have to believe that learning happens with or without our intervention, and informal learning has as much value (if not more) than formal training of the past.

We need to encourage learners to pursue their own professional development and learning experiences, and that means letting go of the idea that we have to control all learning. In addition, if we promote and support the idea that all learning has value, we also need to enable their success.

We must move away from trying to track everything in workplace learning. Look instead at business results and learning impact. Shift your mindset from measuring training, to focusing on performance.

Adopting a new mindset accelerates the adoption process. Promoting this new culture enables learners to value a flexible modern approach, and clarifies for the business that L&D initiatives still support business goals.

Step 3: Pick the right program to begin the transition.

Designing a new blend and introducing it to the organization through the wrong program can hurt the transition process as severely as not modernizing the learning culture. My recommendation is to start with new hire training for a number of important reasons:

- As the first experience new employees have with L&D, it sets the standard that learners are expected to learn at your organization.
- Blended new hire orientation shortens the timeline for resistant learners. After a few years of a successful program, your most vocal learners will have bought into the model.
- Blended learning shortens the orientation training. You'll no longer have to pack an employee's first day on the job full of extraneous and complicated content they won't need immediately.

Research shows the future of learning is blended, and we need to help our organizations, teams, and learners move in that direction. Use the data and recommendations provided here to begin making a strategic plan to modernize your learning function.

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[6]See cited sources: "About"

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Part III:

Learn More

Webinar

Get an in-depth look at these results with Jennifer Hofmann (InSync Training) and Ann McDonald (Mimeo), plus insights on how to implement changes based on our findings.

Register now at: www.mimeo.com/webinars/state-learning-2017

Blog

Mimeo and InSync Training both regularly share best practices, tips, and new for the L&D community on our blogs:

Mimeo: www.mimeo.com/blog
InSync Training's Body Language in the Bandwidth: http://blog.insynctraining.com/

About InSync Training

Established in 2000, InSync Training sets the standard for virtual and blended learning. Founder and President Jennifer Hofmann, leads an entirely virtual team in supporting organizations and practitioners in their learning endeavors. InSync offers IACET accredited virtual classroom certificate programs and workshops for comprehensive, authentic skill building for individuals and corporate teas. They support large-scale initiatives with expert instructional design, project management, coaching, and virtual facilitation & productions services. The Blended Learning Hub, their innovative social collaborative makerspace, launched in March 2017. Curation, collaboration, and creation provide learners with a perpetual learning experience in the Hub. Learn more and access complimentary learning resources at www.InSyncTraining.com.

About Mimeo

The minds, makers, and innovators at Mimeo are dedicated to giving back training teams what matters most - their time. Mimeo provides the fastest, easiest, most reliable way to manage and distribute their content. Mimeo brings customers' content to life through print and digital formats via its enterprise app suite and print production facilities. Founded in 1999 as a startup, Mimeo has grown into a global organization, distributing content to customers in over 140 countries.

The Nuts and Bolts: Methodology and Sampling

Mimeo and InSync Training partnered together for this project. This research is based on a survey run from February 27, 2017 through March 14, 2017. Respondents were solicited through existing professional networks and social media networks relevant to the learning and development industry for corporate, government, and post-secondary education market sectors.

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The survey was available to any participant who elected to complete the survey. All responses were obtained through an online platform to those respondents self-identifying as meeting the criteria for participation. After data collection, the data was removed of any identifying information before being analyzed. All categorical data (job role, tasks, etc.) were self-identified and the instrument included several open-ended questions whose responses were open-coded qualitatively to develop common themes for discussion in this report.

Based on the nature of the response data, multivariate analysis of covariance and related statistical tests were used to develop comparisons amongst and between groups and their responses that self-identified within the characteristics of size of the organization and industry type.

Glossary

These definitions are from InSync Training's *Blended Learning Hub:*

Term	Definition
Assessment	An evaluation of some kind, or checkpoint that ensures the learning has been transferred. It can be a traditional multiple choice type test, on-the-job observation, or can be embedded as a moderated activity, like group work. It can also be self-directed, like a reflection activity.
Augmented Reality	A design approach that layers interactive computer-generated information on top of our existing reality. For example, I can open up an augmented reality app on my iPhone on a city street and catch a few Pokemon.
Delivery mode	The method or approach through which content, interaction, and assessment are disseminated, and received by learners within a learning framework. Types of delivery modes include lectures, workshops, presentations, live events, case-studies, self-paced content, collaborative exercises, reference materials, etc.
Key Performance Indicators	A measurable value that indicates the effectiveness of a training program in meeting its objectives.
Learning communities	A group of people with a common objective who are committed to pursuing a learning pathway in order to reach to that objective.
Learning environment	The physical place or location in which a student learns. Examples include classrooms, mobile devices, and on-the-job.
Learning Management System	A software application that handles the management and delivery of online courses. LMS applications typically include content, interaction, and assessment tools, as well as social media tools to encourage collaboration and community building.

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Microlearning	A means of delivering content to learners in brief, specific bursts and through short-term learning activities. Microlearning allows learners to control what and when they're learning.
Mobile learning	A place where learners work from a tablet or smartphone.
Modern learners	A learner who adopts an exploratory approach to unstructured learning, preferring self-paced, on-demand, and peer learning interactions delivered on any device, over planned learning events.
Modern learning	The evolution of formal and informal learning shaped by technology and social interactions which can happen anytime, anywhere, and on any device.
MOOCs	A free web-based distance-learning program designed to accommodate large numbers of geographically dispersed students.
Personalized Learning	Tailoring learning for each student's strengths, needs and interests—including enabling student voice and choice in what, how, when and where they learn—to provide flexibility and supports to ensure mastery of the highest standards possible.
Pull learning	A learning approach that is learner-centered, continuous, decentralized, shared, and all about results.
Push training	A training approach that is instructor-centered, event-based, centralized, and all about delivery.
Simulations	Instructional elements that help a learner explore, navigate or obtain more information about systems or environments that generally cannot be acquired from mere experimentation.
Social collaborative learning	Formal and informal learning that occurs through interaction with a learner's personal learning networks—including colleagues, friends, family, and connections made through the internet—where they rely on one another's expertise to overcome various challenges.
Virtual reality	A computer-simulated replication or simulation of a space or situation. Virtual reality in learning allows learners to feel like they are actually experiencing the environment, through audio and video input (sometimes even more sensory input, like smell!).
Wearable tech	Educational technology that can be work that enables interaction with others for the purpose of making learning happen.
Webinars	A short online learning session that is largely lecture-oriented and doesn't include practice or assessment.

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