

# THE EVOLUTION OF LEARNING AND ITS ROLE IN ACHIEVING BUSINESS SUCCESS

## Learning & Development Impact Survey 2021



hemsleyfraser

# INTRODUCTION

2020 is a year we will all remember. It was a year of huge turbulence and change as Covid-19 took hold around the world. Lockdown life precipitated seismic shifts in where and how people worked, forcing organisations and individuals to rapidly adapt to new ways of working.

But Covid-19 didn't just change how we work – it also changed how we learn. The digitisation of learning was accelerated in a way that previously wasn't thought possible. Because of remote working, face-to-face learning simply wasn't an option – it was digital or nothing. As a result, 2020 was also a year of massive change for HR and L&D.

# POSITIVE CHANGE

In our recent Learning and Development Impact Survey 2021: The evolution of learning and its role in achieving business success, we asked 465 L&D, HR and talent professionals from a wide variety of industries about the current learning landscape – what's changed, what hasn't, the main challenges facing L&D, learning strategy, impact of Covid-19, future plans and so on. Not surprisingly, the pandemic featured heavily. Our findings show that Covid-19 has pushed up demand for learning. It has accelerated digital and created a situation where learners are more willing and able to seek out the learning they need. This has accelerated self-directed learning. Covid-19 has put L&D in the limelight and enabled the sector to change in ways that it needed to change.

*“It has enabled us to be more creative and has encouraged individual responsibility for self-learning. It raises the unanswered question of effectiveness and evaluation.”*

## A CHALLENGING BIGGER PICTURE

These are some of the positives, but there have also been challenges. The survey found that L&D and HR have been operating in an environment of sustained pressure. Budget, resource and employee engagement have all been issues for L&D and HR, as well as having clarity around the organisational direction and getting buy-in to L&D at a senior level. Brexit has also been an issue for some L&D departments, leading to an increased workload for them. Many practitioners have been coping with all of these extra demands and pressures whilst working remotely and juggling home life/schooling. This is all against a backdrop of ongoing skills gaps - mostly technical skills, but also leadership and management skills. It has not been easy.



# TIME TO LOOK FORWARD

2020 was, by necessity, a very reactive year. Just like other business functions, L&D had to react to the challenges presented by the pandemic situation. But now is the time to be more forward-thinking and take a proactive approach to learning strategy. For the majority, business transformation is still firmly on the agenda, as is capability development, employee self-fulfilment and engagement, operational success and knowledge sharing and engagement.

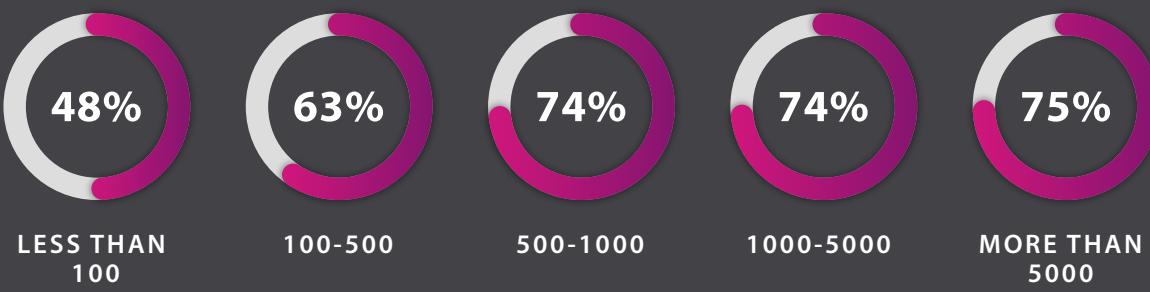
As always, technology is a top priority. Many of the survey participants have reviewed their tech platform over the past 12 months, either because face-to-face learning wasn't possible

or because their existing platform wasn't able to handle the increased scale and variety of use.

Above all else, it's clear that it has been a challenging time for L&D and HR. The business world has talked about operating in a VUCA (volatility, uncertainty, complexity and ambiguity) for a long time, but 2020 really was a VUCA year. And we are still living, working and learning in a VUCA environment. But, it has also been a time of huge opportunity. L&D needs to make the most of those opportunities to drive forward a learning strategy that will have a real impact.

## HAVE THE PAST TWELVE MONTHS CAUSED YOU TO REVIEW THE TECHNOLOGY YOU USE TO FACILITATE LEARNING?

RESPONDENTS THAT SAID YES BY EMPLOYEE SIZE:



## A BRIEF LOOK BACK TO OUR DIGITAL IMPACT SURVEY 2019

Before discussing the findings of this year's survey further, it's worth casting our minds back to our Digital Impact Survey 2019. A top priority in that survey was increasing the provision of digital learning. L&D knew it had to improve on digital learning but was struggling to achieve it. One of the main barriers to the faster adoption of digital technologies was mindset: the mindset of leaders, employees and company culture. Those mindsets were overcome in 2020 because there was no choice: we had to go digital. Leaders have been working and learning digitally and employees have been working and learning digitally, both of which caused company culture to shift. The mindset barrier has been removed. For many, the new mindset is digital-first, and will remain so, even when face-to-face is back on the table.

# SKILLS GAPS

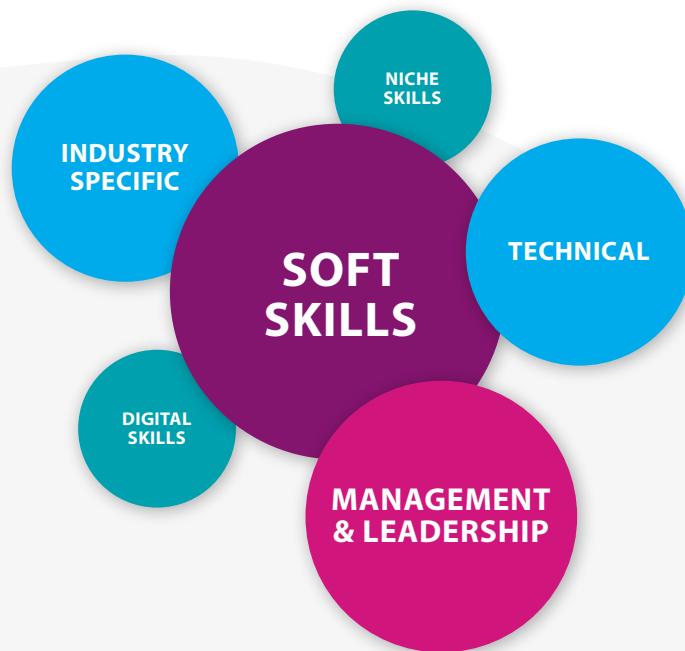
Organisations constantly struggle with skills gaps, and the accelerated pace of change over the last 18 months has intensified that struggle. As a result, many organisations say they have been unable to meet their skills needs. Just over half (52%) of people taking part in the survey said their business was currently under pressure because of skills gaps.

Employers operating in competitive sectors have found it particularly difficult to source experienced talent. In some cases, this has forced them to fill management roles internally. Although it's good to build up internal talent pools, organisations haven't always given new managers the necessary training when they've needed it, leading to the rise of the 'accidental manager'.

The turmoil of the past 18 months has led to a rapid and sometimes dramatic change in needs. Many survey respondents said their workforce is not ready or equipped to deal with those changes, a situation that needs to be addressed. Digital transformation is an ongoing process where organisations need to acquire or build up (preferably build up) the relevant skills.

There is a shortage – acute in places – of people with the right technology skills. In particular, respondents reported a strong need for people with niche technical skills such as software development, information security, data science and digital marketing. Soft skills have also shot up the priority stakes, especially with regards to leaders and managers. Organisations need leaders and managers with the skills to lead remotely, to lead dispersed teams and to manage through change and uncertainty.

Digitisation, the constant stream of new technologies, the rise of automation and the emergence of new roles in a post-pandemic world means skills needs are going to keep diversifying. L&D and HR have to keep abreast of the skills agenda because these challenges are not going to go away.



# HOW TO OVERCOME THESE SKILLS GAPS

The best way to address skills gaps is to build a strong internal talent pool, rather than always looking externally to find skills. Some practitioners intend to recruit externally, but a significant number plan to take a more proactive, strategic approach to workforce planning and only recruit externally as a second option.

A lot of the responses highlighted the need to foster a collaborative learning culture, such as this response: "We need to complete a skills audit to get a clear picture of exactly what the gap is. We then look to build a skills-based culture where we can share innovation and experience among each other rather than just relying on a training course".

Formal mentoring and coaching programmes were cited as important by many respondents, suggesting a definite desire to improve competencies and behaviours at every level. Apprenticeships cropped up a lot as a necessary way to build workforce skills.

There is also a growing recognition of the importance of informal learning that happens

every day and a desire to harness and facilitate more. This learning needs to be captured and shared on an informal level and on a more formalised coaching and mentoring level.

It's clear that the spotlight is firmly on leadership development and succession planning. One respondent said: "We are developing a leadership curriculum. We are introducing a global learning platform where content will be offered to help fix some of the skills gaps." Another said: "Over the next three years, we will develop and embed senior, strategic learning plans to aid the development of the board and senior management."

This indicates that L&D and HR know that having strong, forward-focused leaders and managers is critical to business success.

Digital is, for obvious reasons, an ongoing area of focus: building up digital skills and behaviours, improving access to new ways of learning and introducing and improving toolkits, content libraries and virtual workshops.

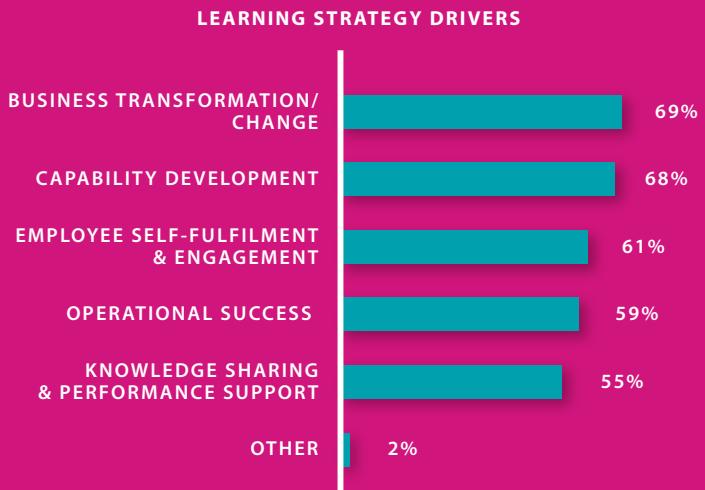


# LEARNING STRATEGY

In terms of learning strategy, several strong themes stood out in the survey. Business transformation took the top spot, just, cited by 69%, followed by capability development (68%), employee self-fulfilment and engagement (61%), operational success (59%) and knowledge sharing and engagement (55%).

How does L&D measure the success of the learning strategy in their organisations? Many don't, unfortunately. In terms of performance data, three quarters said they measure it, but 104 of the 465 don't. This needs to change.

For many, learning approaches have undergone a substantial shift in the past 12 months, for obvious reasons. Digital learning has dominated, with 73% offering blended learning, 73% free online resources, 65% have been running webinars, 53% virtual classrooms, 42% a content library, 55% an LMS, 31% curated resources and 5% an LXP.



## BUILDING AN AGILE LEARNING CULTURE

*An agile learning culture can be defined as a collection of organisational conventions, values, practices and processes which encourage employees and organisations to develop knowledge and competence. It puts continuous learning at the heart of the organisation and seeks to benefit from the various knowledge centres throughout the business.*

Learning agility is critically important in today's VUCA world. L&D, HR and employers know they need to develop and support an agile learning culture. Over 50% of the survey respondents said an agile learning culture is extremely important, with 30% saying it was somewhat important. The majority (over 85%) said it was important to some degree.

Some of the answers to the question 'How do you intend to overcome these skills gaps?' demonstrated that practitioners know agile learning is crucial. One respondent said: 'Encouraging the use of social media in the workplace to provide quick responses for those who need help and assistance,' for example.

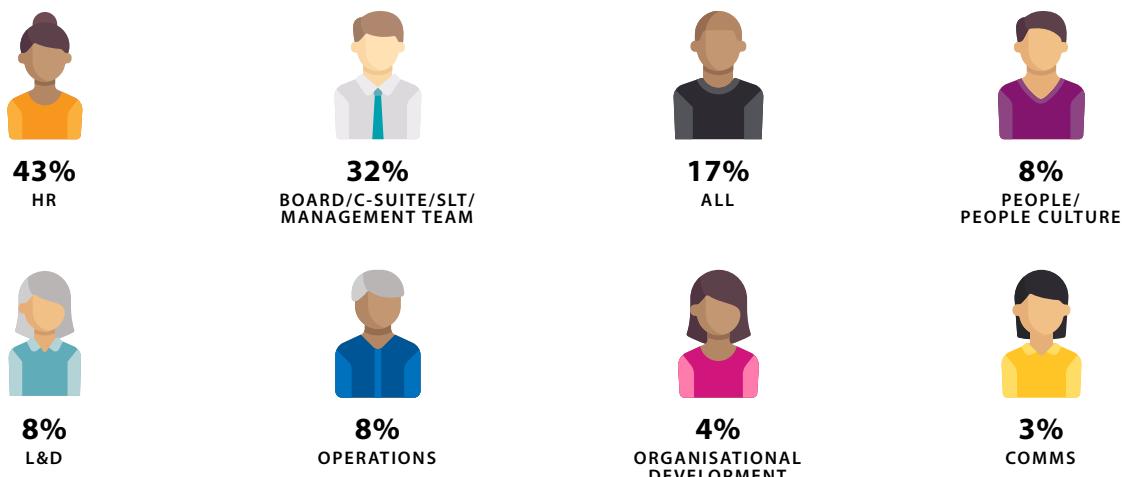
How far are organisations on their roadmap to building an agile culture? The majority (43%) are still defining the scope, 21% are in the process of implementing their roadmap, 5% have completed their roadmap and 9% have a roadmap which they are on the cusp of launching. That leaves 22% who have not started and will not be doing so in the immediate future.

For those practitioners that are on or are yet to launch their roadmap, there are organisational barriers they need to overcome - budget, resources, time, Covid-19 and technology. Time cropped up repeatedly as a barrier to employees engaging in agile learning. "Having time when at work to learn", "Time pressures", "Time – colleagues are more time-poor than ever, with higher demands on output".

# THE DRIVERS FOR AGILE LEARNING

In order to achieve an agile learning culture, it is clear that certain drivers need to be in place. Buy-in from stakeholders emerged strongly as a theme. Respondents talked about the need to educate people about and engage them in the importance of continuous learning. Employees need to want to learn - "People pulling learning, not having it pushed" said someone – and the business, the C-suite and the organisational culture have to support learning at every level. Those drivers are fundamental to the success of an agile learning culture.

But, ultimately, which business function is responsible for creating and shaping organisational culture? Is it HR? The top table? L&D? Our findings give a mixed response: 17% said all business functions, 43% said HR or HR and other business functions, and just 8% said L&D or L&D and other business functions. The board, c-suite, leadership or management team are involved according to 32% of respondents.



## ALIGNMENT

Businesses are changing, and the learning landscape is changing – how can L&D and HR make sure there is a shared direction? In our survey, we asked: "Thinking about the next 12-18 months, what do you think will accelerate the impact of your learning strategy on business success?"

This is a really critical question that L&D should always be asking of itself. Posing that question in our survey produced some interesting results:

- "Clarity of direction, buy-in of senior staff, engagement of staff"
- "Individuals understanding the importance and benefit to them."
- "Managers having better development discussions."
- "Having a more defined strategy."

- "Success breeds success. If we can get some progress on the key strategies we are looking to implement that will help accelerate the impact."
- "Launching the LMS and more online access to relevant courses."
- "Having a more agile approach to facilitate learning."
- "Clear strategy aligned to business performance, budget, board buy-in."
- "Technology investment to allow easy-access social learning that can trigger a cultural change."
- "Having the right access and data."

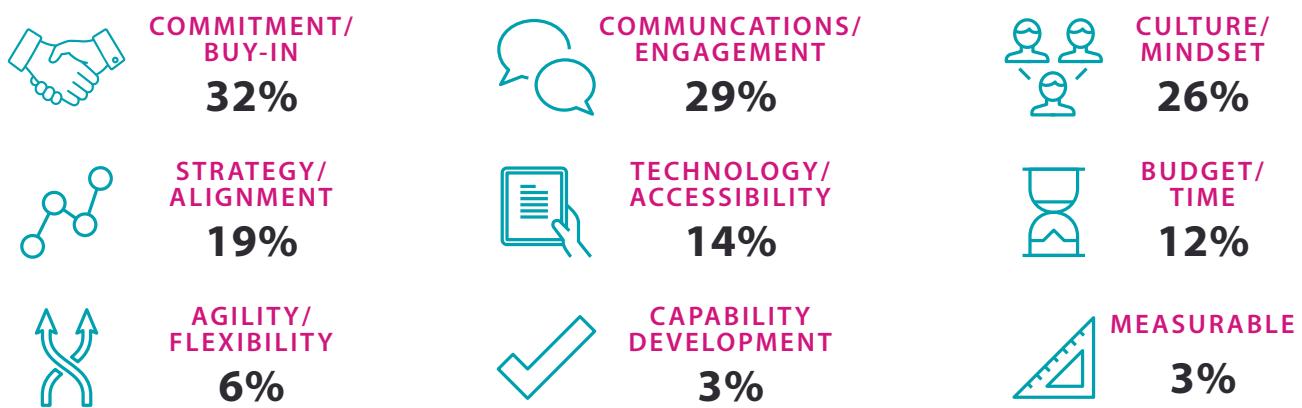
Several themes kept recurring – technology investment, data analysis, strategic focus, employee engagement and leadership buy-in. It's clear that most L&D practitioners realise that learning has to be aligned to business strategy in order to produce the results the business needs.

# COMMUNICATION AND ENGAGEMENT

In order to get buy-in for the learning strategy, L&D and HR need to ensure communications are clear, consistent and in a language that resonates with employees and the business. The senior leadership team need to be on board, and they need to help the rest of the workforce engage with the strategy. Managers have a critical role to play here as they are best placed to engage employees with the organisational strategy and objectives. They have also been a particularly important link between organisations and remote learners during the pandemic.

Some organisations have responded really well to the current challenges. “We have created a learning commitment initiative, whereby we allow employees to utilise a capped amount of working hours towards learning each year. We have also created a tool for them to record their learning experiences and build more purposeful development plans,” said one, while another said, “More mental health and wellbeing content made available.”

## KEY DRIVERS TO THE SUCCESS OF IMPLEMENTING AN AGILE LEARNING CULTURE



## CONCLUSION

It has been a very challenging year for L&D and HR. Workloads have been heavy, time and budgets have been tight, and there has been so much change and uncertainty. Despite these constraints, L&D has had to shift its operating system from face-to-face to virtual. The bar has been raised very high in terms of what it needed to achieve to help the business and employees operate remotely during the pandemic.

But, on the whole, learning teams have delivered. Learning has been delivered digitally, at scale and with much greater functionality. Digital learning has gone from being an aspiration to an accepted reality. L&D needs to capitalise on the opportunities presented by the extraordinary events of the past year. It needs to create building blocks to use and reuse resources so that learning becomes cheaper and more personalised over time.

The emphasis now needs to be on building up leadership and management capabilities and the all-important digital skills. This requires a much greater and deeper focus on developing an agile learning culture. Over 50% of respondents said an agile learning culture was really important. In order to achieve it and support transformation and skills development, L&D needs to make it one of its top priorities in the coming months.

# THE LEARNING TECHNOLOGY STORY

Just over two-thirds of respondents (67%) said they had reviewed their tech platform over the past 12 months. That still leaves 33% that haven't. Why haven't they? Answers varied – some already had an LMS, some have an LXP, some had already digitised, and others did not have the budget.

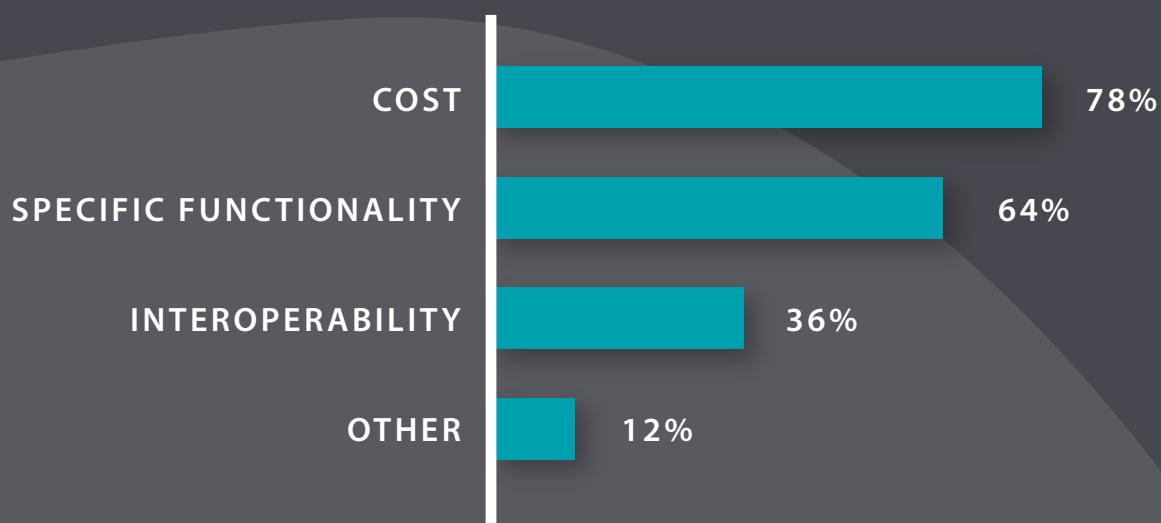
And those respondents that did undertake a tech review, what reasons did they give? In many instances, the Covid-19 situation forced their hand. "We've had to move to an online platform – we wouldn't have reviewed this if there were no Covid restrictions," said one respondent.

Others realised their tech needed an overhaul because their current provision wasn't fit for purpose – it wasn't robust and flexible enough to facilitate the scale and variety of digital learning. The workforce needed ready access to a wide range of learning, and for many organisations, that meant an upgrade in tech. "We need a learning platform that will host a wider range of learning engagements, especially collaboration/knowledge share activities" said one respondent. "Current LMS not flexible enough for the different deployment models we now need," said another.

Many were also not satisfied with existing content and functionality and felt they needed a better system with better off-the-shelf content. For example, some respondents said their video conferencing platform had limited functionality, which affected the learning potential.

What were the key considerations when looking at the technical options? The cost was the number one priority (78%). Functionality was also important (64%) and interoperability (36%). Other considerations included ease of use, UX, accessibility, compliance and building a learning culture.

## KEY CONSIDERATIONS WHEN REVIEWING LEARNING TECH



# THE RESULTS IN FULL

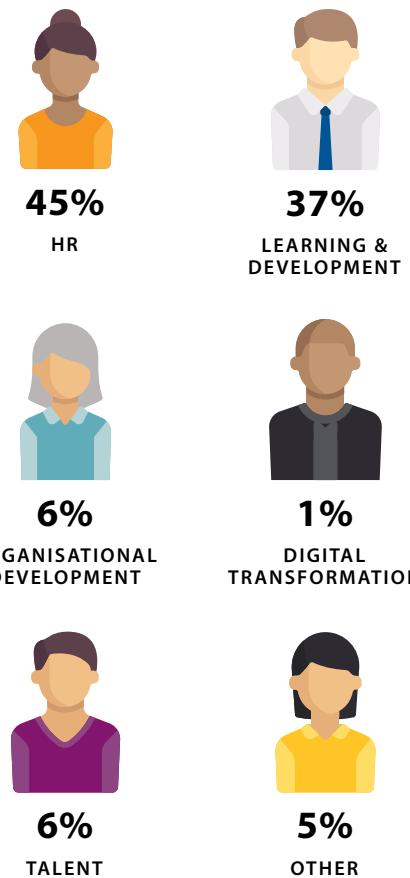
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# WHO TOOK PART?

## 1. Which of these best describes your role?

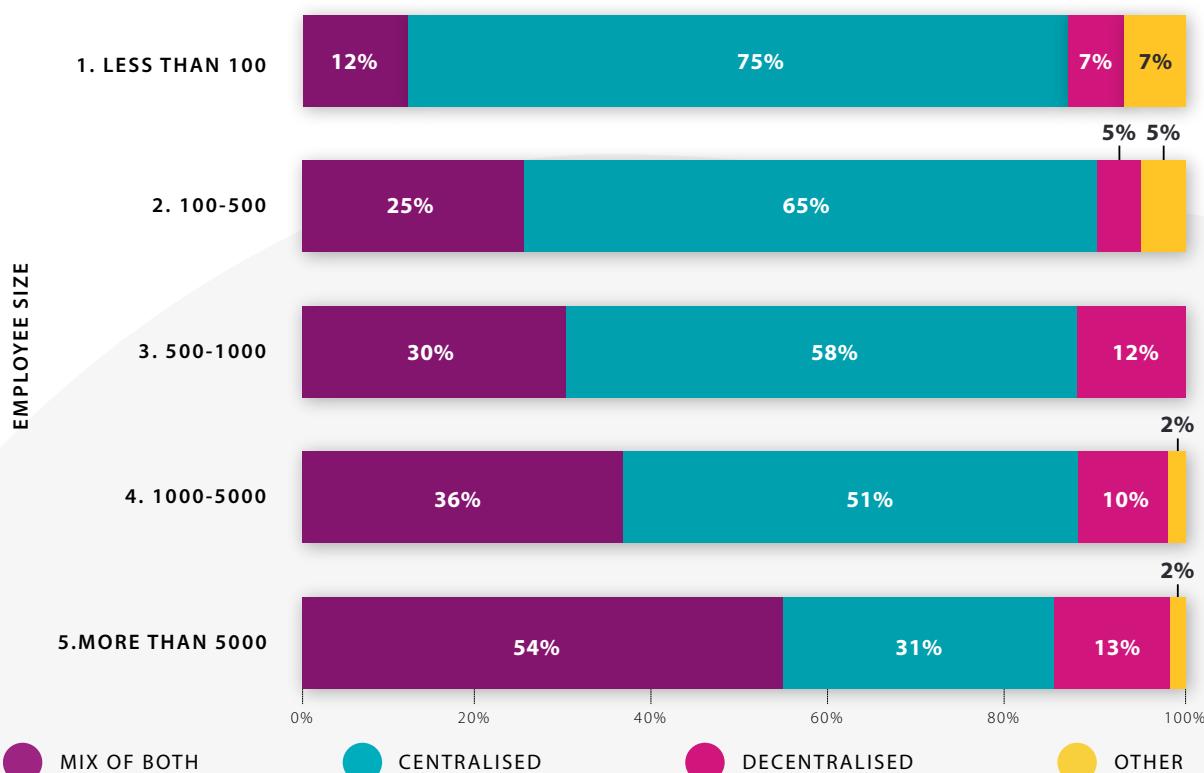
A total of 465 respondents recently completed our 2021 Learning & Development Impact Survey.

Respondents were predominately from HR, L&D, OD and talent roles across a wide variety of industries.



## 2. How many people does your organisation employ and how is the L&D function structured at your organisation?

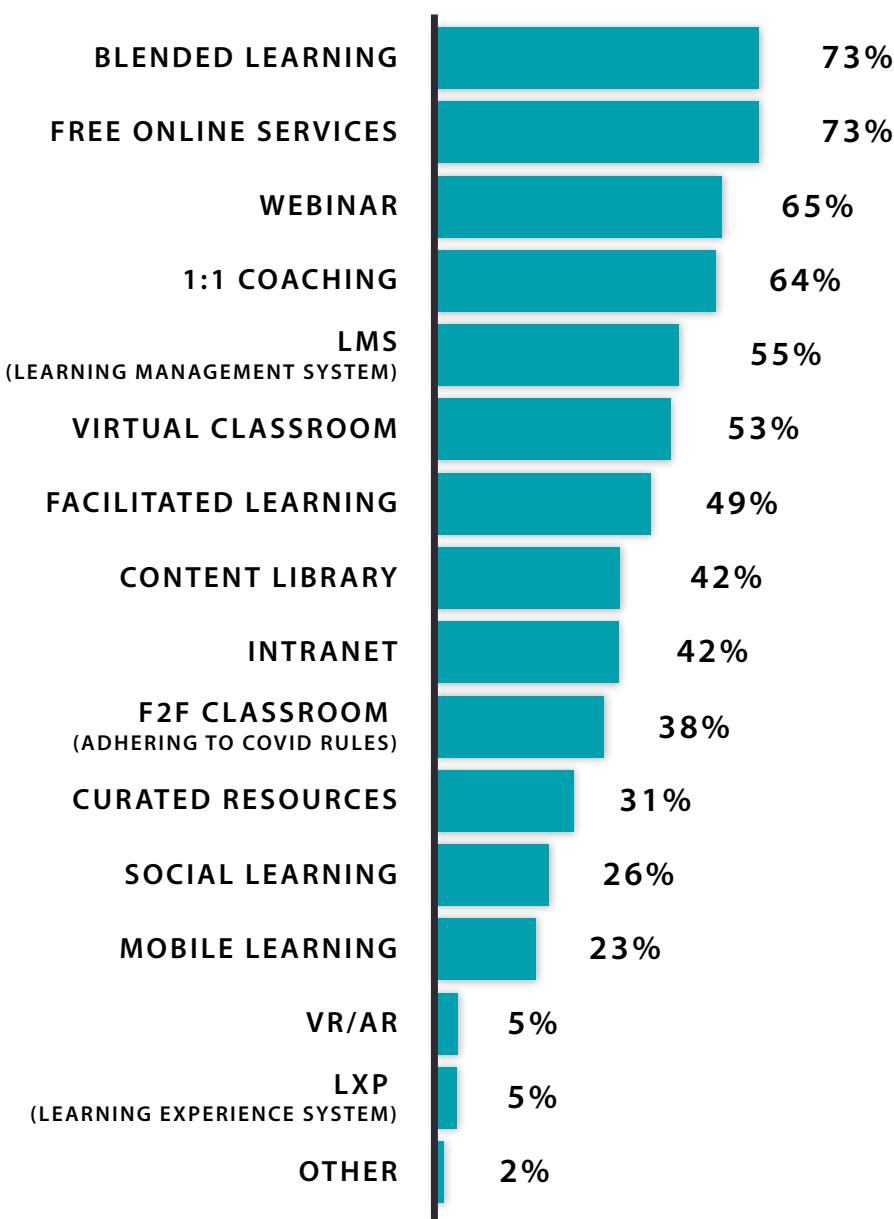
Almost 58% of respondents came from large organisations of more than 500 employees, with the rest a mix from small and medium-sized businesses (16% with less than 100 and 26% with 100-500 employees).



# LEARNING APPROACHES

## 3. Which learning approaches do you currently use in your organisation?

Organisations are using on average six differing approaches in their learning mix. Digital learning approaches have dominated: 73% offer blended learning, 73% free online resources, 65% have been running webinars, 55% an LMS, 53% virtual classrooms, 42% a content library, 31% curated resources and 5% an LXP. One-to-one coaching (64%) and facilitated learning (49%) also featured highly indicating the need for more personalised and targeted learning.

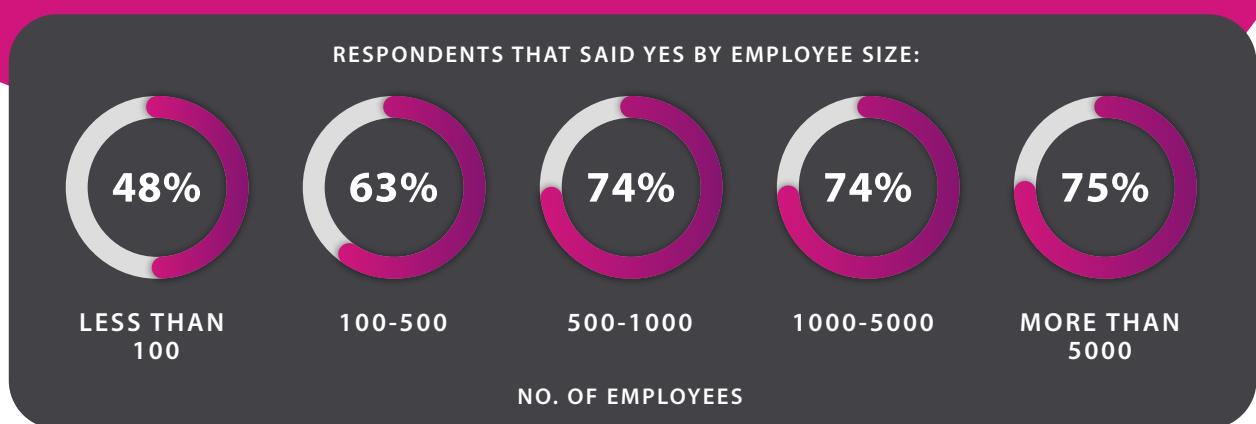


## LEARNING TECH

### 4. Have the past 12 months caused you to review the technology you use to facilitate learning? (E.g. LMS, LXP, other learning platforms)

67% of organisations have reviewed their learning technology in the last 12 months – the main reasons cited were because face-to-face (F2F) training was not possible and that current tech provision was not suitable for the scale and variety of use. Those that said no indicated they already had an LMS, were digitised long ago, have an LXP or do not have the budgets.

**67%**  
of organisations  
have said YES



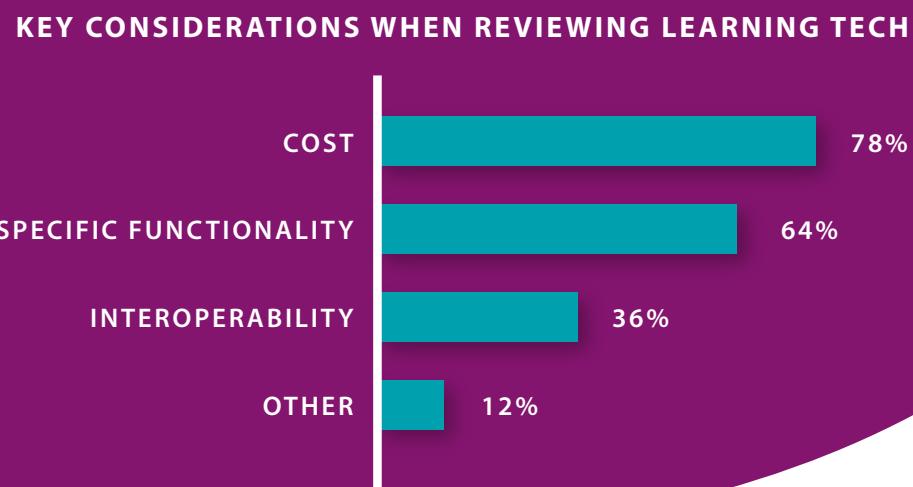
**“** Video conference platforms had limited functionality which limited learning. **”**

**“** We need a learning platform that will host a wider range of learning engagements especially collaboration/knowledge share activities. **”**

**“** Current LMS not flexible enough for the different deployment models we now need. **”**

## 5. What are your key considerations when reviewing your learning tech?

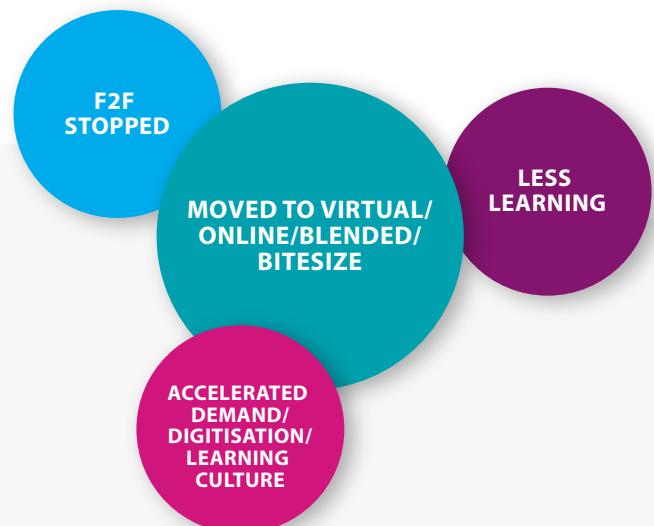
On average, two considerations were at play when reviewing learning tech. Key considerations were cost (78%) and specific functionality (64%), although interoperability has an important role to play (36%), highlighting the need for learning technology to work well with or complement other business systems. Other reasons cited were ease of use, UX, accessibility, compliance and building a learning culture.



## THE PANDEMIC AND OTHER CHALLENGES FACING L&D

### 6. How has COVID-19 impacted learning within your organisation?

Unsurprisingly, many respondents commented that there had been a switch to online and virtual learning and that F2F training had either stopped or was restricted to small group sizes. Some commented that different approaches to learning are likely to be a permanent change. In terms of the volume of learning, it was a mixed picture - approximately 15% said there was less learning, whereas an additional 15% stated that demand had increased or that the pandemic had accelerated the digitisation of learning and learning cultures.



Among the reasons for less learning were decreased budget, employee burnout, furlough, business prioritisation and the inability to have F2F for certain types of training.

## 7. Aside from COVID-19, what have been the main challenges facing L&D at your organisation in the last year?

Key challenges mentioned are either directly related to, very closely link, or were exacerbated by the pandemic.

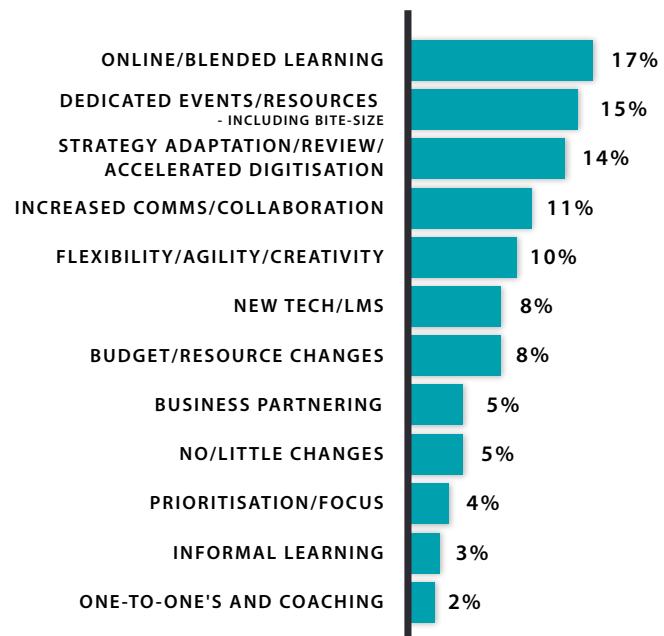


## 8. How have you responded to these challenges?

More virtual and blended learning has been delivered, and more dedicated/focused content created in response to the challenges. In particular, bite-size, webinars and micro-learning approaches covering topics such as mental health and wellbeing. More one-to-one's, informal learning, free resources, and coaching has also been used.

Many respondents talked about a conscious effort to increase communications in the business, and some explained how L&D were partnering more closely with the leadership and the business more generally, providing additional support to employees. This has helped to prioritise and focus learning within the business.

There has also been an obvious need to rethink approaches, be creative, agile and flexible. Many have introduced new technologies and are looking at how they can make the best use of existing systems.



On the downside, some organisations have had to delay learning or have simply not been able to respond to all challenges because of budget changes.

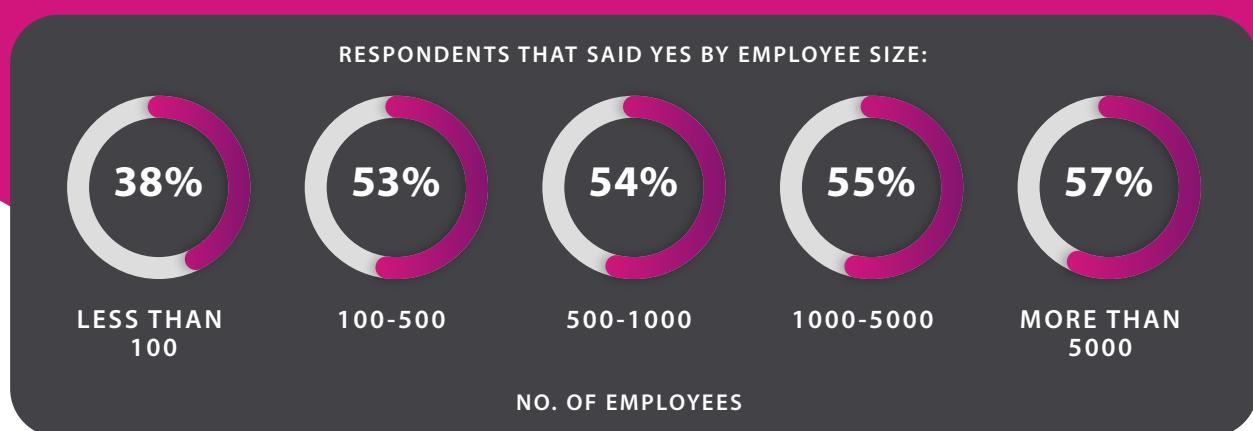
**“** We have created a learning commitment initiative, whereby we allow employees to utilise a capped amount of working hours towards learning each year. We have also created a tool for them to record their learning experiences and build more purposeful development plans. **”**

# THE SKILLS GAP

## 9. Is your business currently under pressure due to skills gaps?

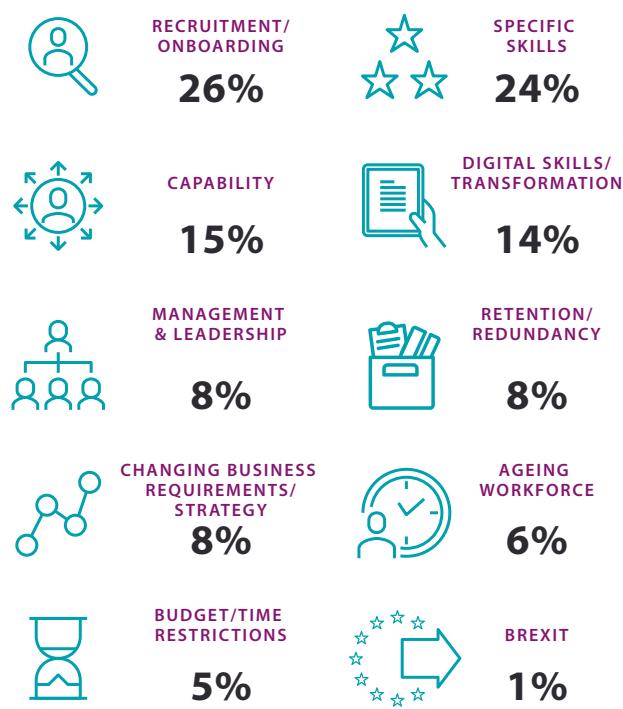
52% of respondents said that their organisation was under pressure because of skills gaps – the gaps appear to increase with the size of the organisation (number of employees).

**52%**  
of organisations  
have said YES



## My business is currently under pressure due to skill gaps because...

There are a number of factors at play, most notably recruiting the right talent or those with very specific skills – in particular technical/IT skills, niche skills (digital marketing, sales, information security, data analysis) or competitive sectors. Others mentioned the ageing workforce, fast-changing needs within the business and the emergence of new roles, leading to the need for new capability development. This includes leadership and management capability gaps and the emergence of accidental managers. The digital skills gap has also become more apparent with more remote working, increased automation and new technology.



## 10. What are the skills and behaviours most needed?

The skills and behaviours most needed fell into four broad categories: Soft skills (such as collaboration, feedback, resilience, storytelling, influencing, agility, wellbeing...), management and leadership skills (leading remotely, authentic leadership, empathy, hybrid working), software development and technical and niche skills – such as marketing, sales and data analysis.



## 11. How do you intend to overcome these skills gaps?

Responses showed that organisations intended to use a range of formal and informal learning approaches to upskill and develop capability – using training programmes and courses, blended learning, on-demand resources, LMS systems, coaching, mentoring, knowledge sharing and learning on the job. The use of apprenticeships, graduate schemes and trainee programmes was also cited.

Talent acquisition, development and succession planning is also an important part of the mix.

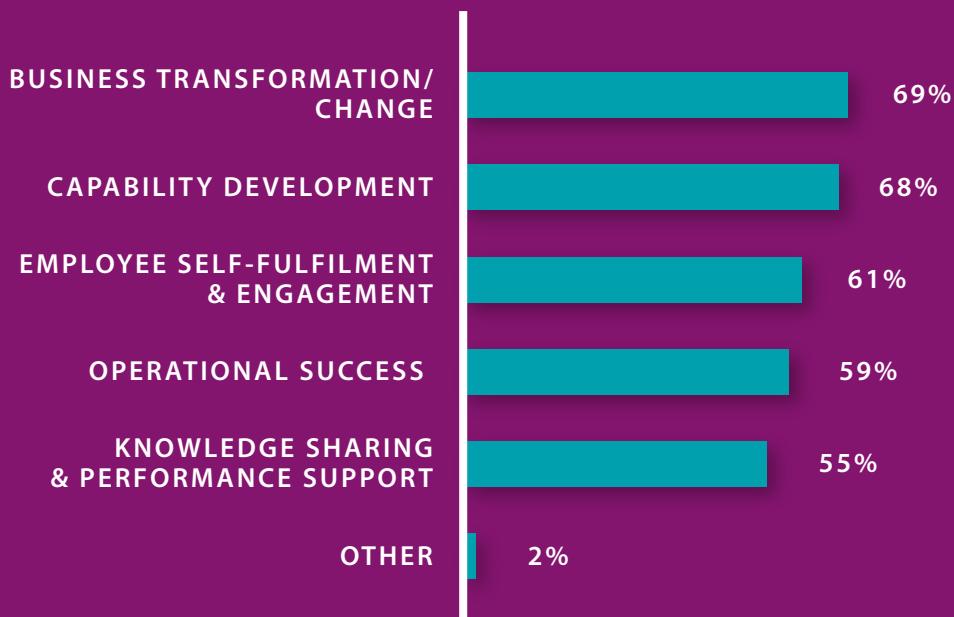
Some organisations are carrying business reviews and gap analysis, looking at frameworks and learning pathways to help address the gap.



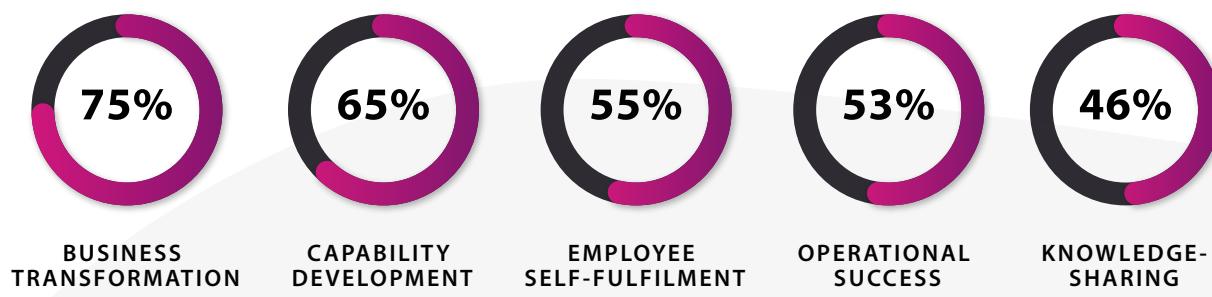
# LEARNING STRATEGIES

## 12. Which of these is driving your learning strategy?

At more than 80% of organisations, at least three factors were driving the business strategy. The split was reasonably even with business transformation/change at the top followed closely by capability development and then employee self-fulfilment and engagement.



At larger organisations, business transformation and capability development were high on the agenda. At smaller companies, there was a more even spread.



LEARNING STRATEGY DRIVERS AT LARGER ORGANISATIONS (5000+ EMPLOYEES)

### 13. How do you measure the success of learning strategy in your organisation?

Approximately 25% of those surveyed have no or very minimal measures in place - this was much more pronounced at smaller organisations.

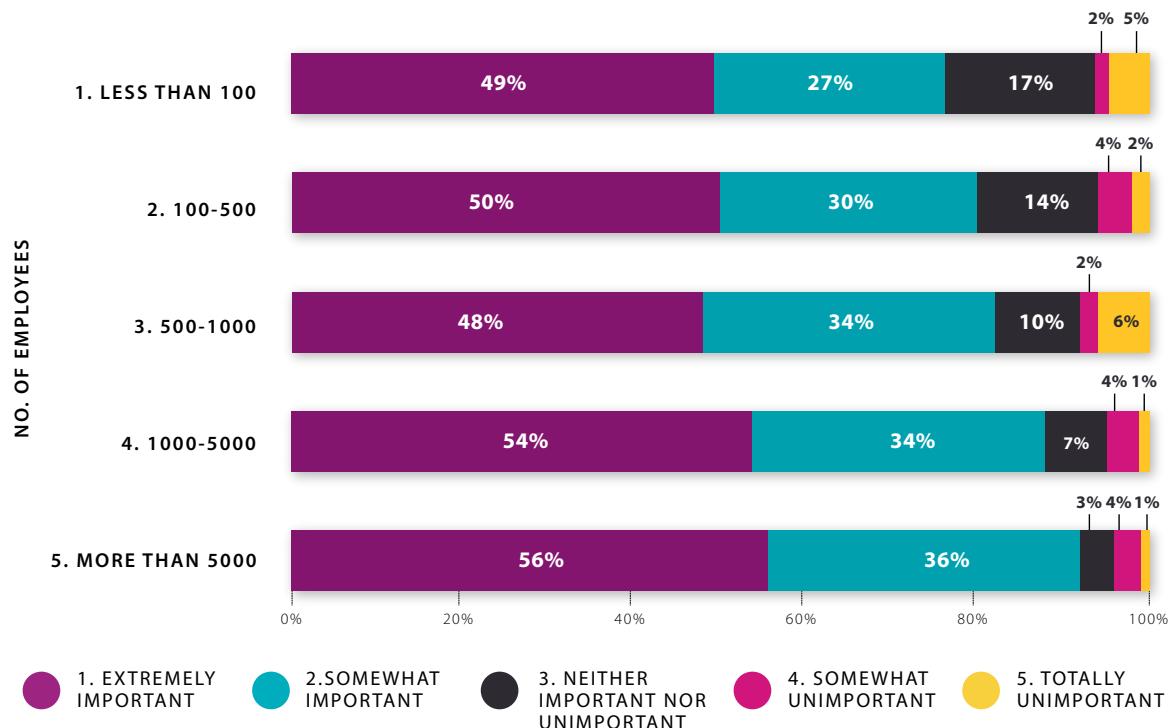


Those that do measure predominantly use feedback forms, surveys, engagement metrics, KPIs and evaluations.



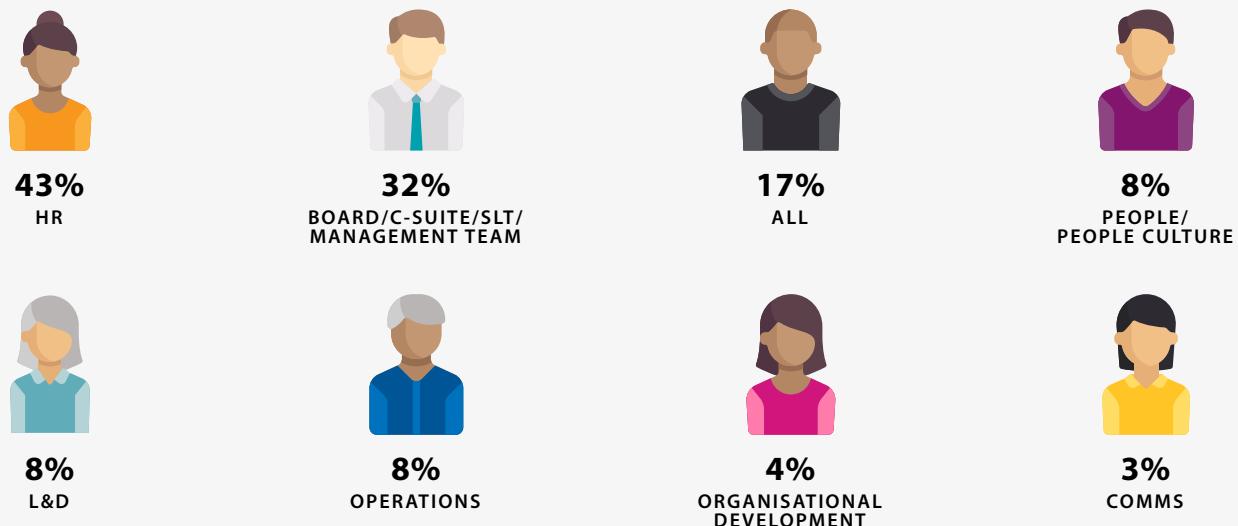
## 14. How important is it to your organisation to build an agile learning culture?

Building an agile learning culture is high on the agenda for many organisations with 85% citing this as either extremely important or somewhat important - this was even more marked in larger organisations at 92%.



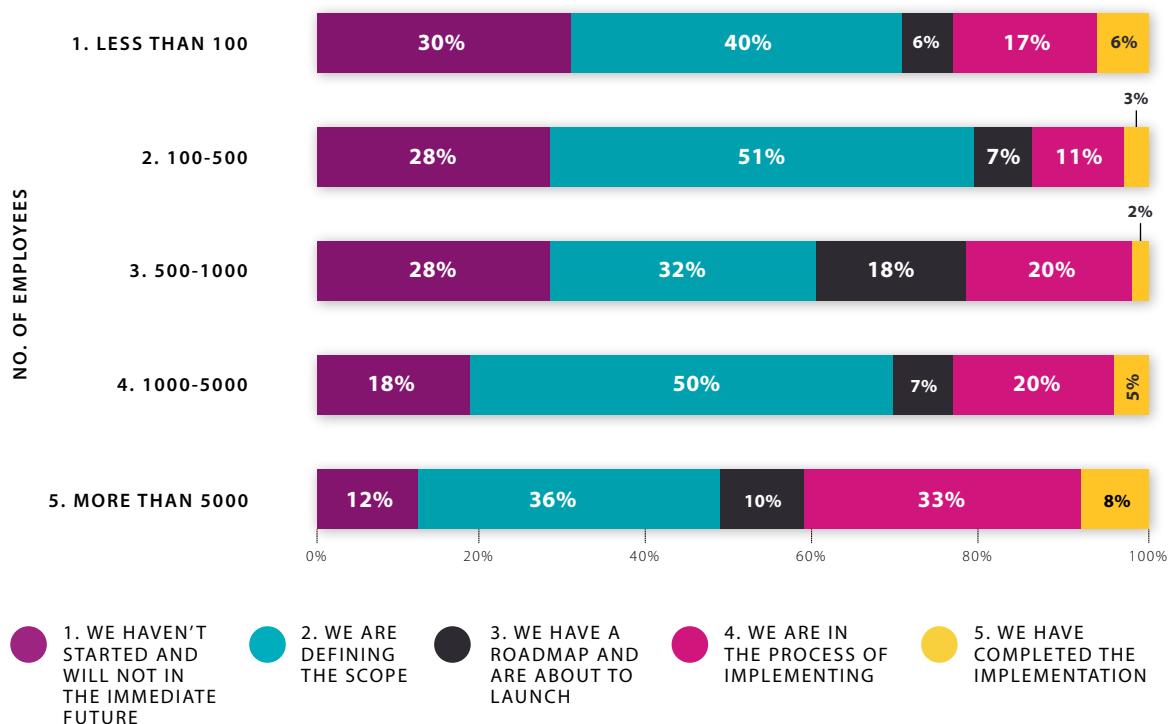
## 15. Within your organisation, which business function(s) are most responsible/integral for creating and shaping organisational culture?

The business functions involved are most frequently HR/L&D/OD with the C-suite and senior management team. A large number also commented that this was the responsibility of every individual in the business – buy-in and engagement are critical for success.



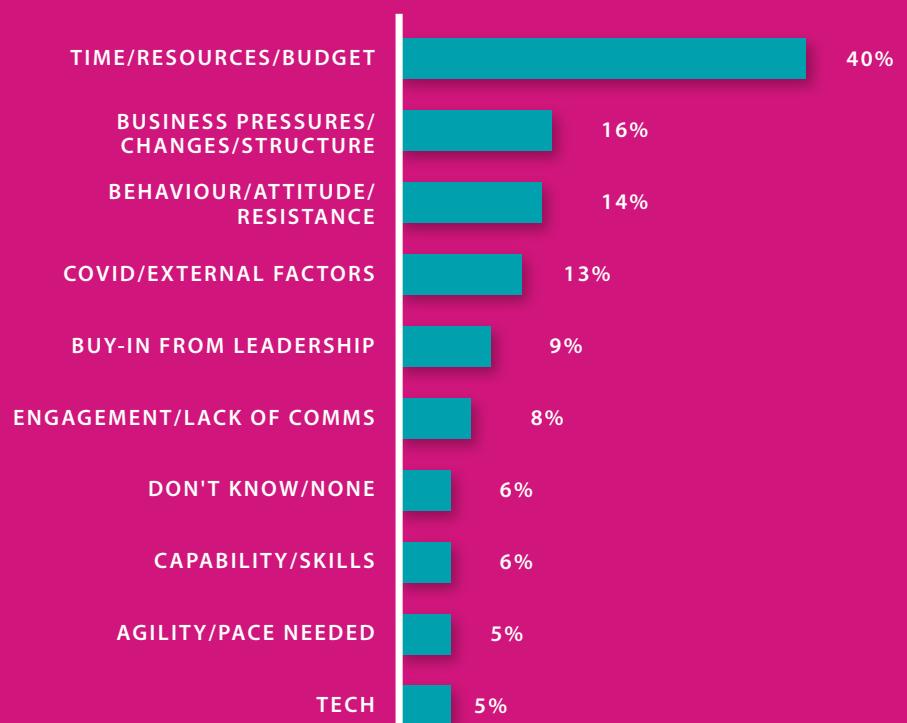
## 16. Where is your organisation on the roadmap to building an agile learning culture?

Overall, 26% of organisations have either completed or are in the process of implementing an agile learning culture – this seems to be more pronounced at either the largest or smallest organisations. A further 22% haven't started and have no immediate plans to do so – this is much higher at smaller organisations, with those under 100 rising to almost one third.



## 17. What are the barriers to success for the organisation?

The overwhelming barriers to success were time, resource and budget – time was a factor because of the pandemic, widespread furlough and operational pressures. As a result, there was less buy-in from managers for learning. Some organisations didn't see learning as a priority against the immediate operational day-to-day pressures, while others were going through restructures and significant business change. Some L&D departments have been met with resistance or a lack of support for learning.



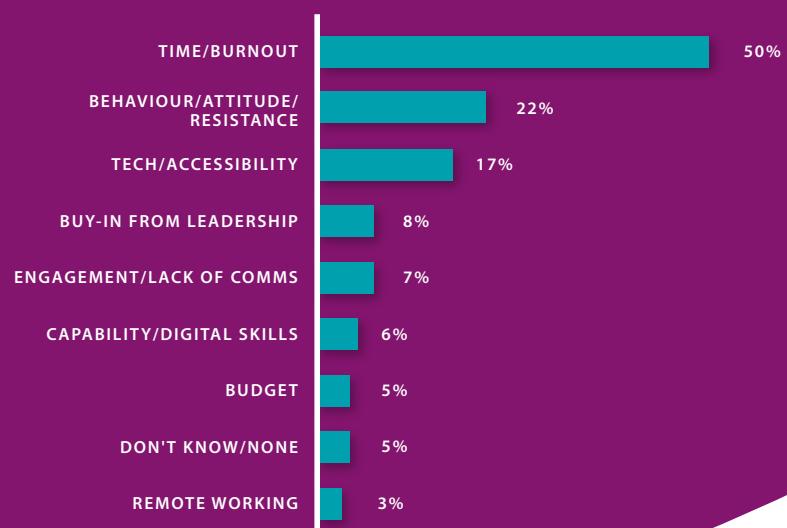
## 18. What are the barriers to success for learners?

The main barrier to success was time and employee burnout – many learners cite feeling time pressures because of the impact of the pandemic on business performance, or taking on additional workloads because of furlough. There also seems to be a perceived lack of time for learning by some managers and leaders because of these pressures.

Resistance or behaviour was also a factor. Some were resistant because of time pressures or pressure from their managers. Others have struggled to see the value of learning and are not taking ownership for their own development – it is something that is ‘done to them’.

Accessibility of learning is a key issue for learners – hybrid working models present a number of challenges for both employees working from home but also those still in the office who traditionally had a very heavy reliance on face-to-face learning such as those in a retail environment. Many still lack the digital skills needed to fully embrace the opportunity in digital/virtual learning.

Having the right technology, processes, support and communications in place is also important to providing engaging, effective and timely learning. Some mentioned poor LMS systems or the inability to invest.

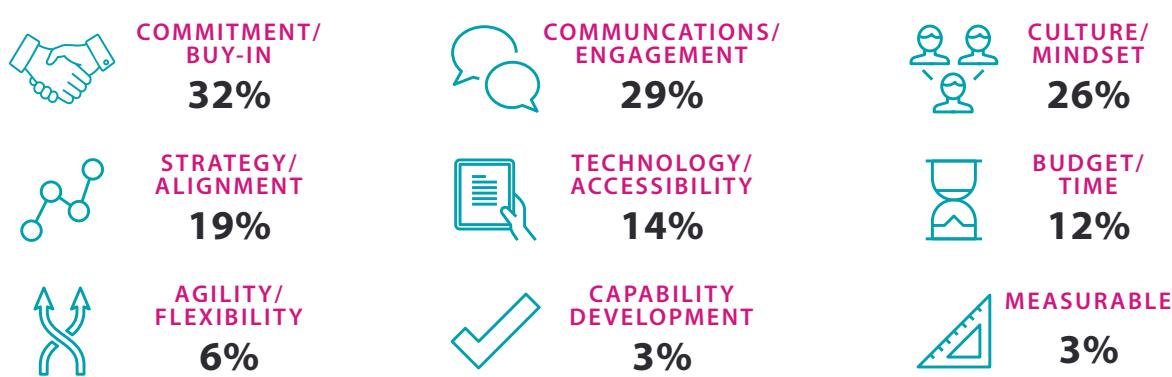


## 19. What would you consider key drivers to the success of implementing an agile learning culture?

Much needs to be done to achieve more agility in learning provision to help meet priority business goals, and for learners to take ownership of their own continuous professional development. For this to happen there needs to be a clear strategy with buy-in from leaders, managers and learners. Importantly, this will require a change in mindset and a shift towards

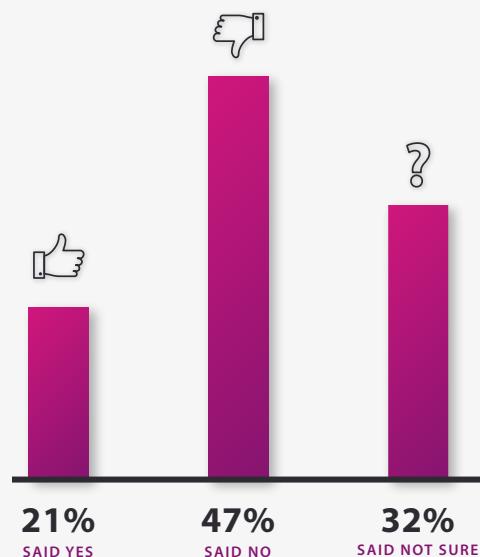
a culture of learning that is aligned with business goals.

At the heart of this is clear and timely communication that helps to drive collaboration and engagement. Learning needs to be accessible and available in the flow of work to support this.



## 20. Does your organisation plan to increase its learning budget for the year ahead?

The year ahead for L&D looks uncertain, with only 21% saying they would see an increase in budget. One-third of respondents said they weren't sure, and 47% said there wouldn't be an increase. 2021 looks like being a year where we must all find innovative ways to achieve more with less.



## 21. Thinking about the next 12-18 months, what do you think will accelerate the impact of your learning strategy on business success?

Respondents stated that having a clear strategy or framework in place was needed. Having the right technology that is accessible to learners is key to success. Connected to this is the digital capability of learners to fully harness the opportunities available.

Budget, time, resource and demand from learners will also be a factor in the year ahead – some stated this would be connected to business growth and performance. Others said that buy in from leadership and managers would impact success.

External factors – COVID, Brexit and the speed of normalcy will also remain strong influences – there was a clear need to be agile and to adapt to change with speed. Increased collaboration and communication coupled with timely learning to drive engagement was cited as required to support this. The ability to measure the success using data would also enable further buy-in from leaders and learners.



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