

Reimagining L&D Capabilities to Drive Continuous Learning

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Overview

By many accounts, the learning and development (L&D) function is at a crossroads. Changes in the way work is done and the way workers learn have rendered many traditional learning methods outdated and clunky. L&D leaders now find themselves in the precarious situation of having to rapidly change—not only the outputs they create, but also their fundamental beliefs about learning and how they operate.

This report provides insights on how L&D professionals should consider changes to meet these new challenges.

In This Report

- Why continuous learning is essential and why the current focus of L&D departments hinders continuous learning
- What capabilities L&D should focus on to enable continuous learning
- Emerging L&D roles
- Mindset shifts

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Introduction

From its origins and through its many revolutions (e.g., apprenticeship, factory classrooms, systematic training, job support, asynchronous, e-learning, and even performance support), L&D's purpose has been to effectively train workforces in the most economical way possible.

L&D departments deserve credit—they have been able to effectively modify their methods and modalities over time to accommodate these goals. They have, in effect, continued to build better and better mousetraps. Until fairly recently, this worked for the following reasons:

1. Information flowed from the top of the organization to the bottom. Until about 15 years ago, the trainer, leader, or manager was often the smartest person in the room, and had access to the most information.
2. Learners had access to the job training that the organization provided—and nothing else. Search engines, YouTube, lynda.com, social networks, and other rapid communication tools did not exist, so L&D basically had a monopoly on professional learning.
3. Tasks were taught as having one correct way to accomplish them—the most efficient way—that may likely have guaranteed some level of effectiveness if workers performed them as trained.



KEY POINT

Due to technological advances, access to information, and changes in work, L&D departments should reinvent themselves.

However, in most cases, these are no longer true. Technological advances often mean that people who show up to training events know as much as, if not more than, the facilitators. They also have other options for learning than just company training. Information is ubiquitous, free, and comes from many, many sources.

Likewise, today's knowledge workers are asked to do more than just complete tasks. Now the focus is on "thinking outside the box," embracing innovation, improving processes, and helping the company to better compete.

This shift in focus leaves L&D in uncharted waters. The processes and infrastructures that L&D organizations have built over the years are reinforced by architectures, systems, and technology which support antiquated thinking. L&D departments need to completely reinvent themselves; and they need to develop new skills, capabilities, and behaviors in order to do it.

What Is Our Job and Why Are We Falling Short?

An organization's success depends on its people—not just its people, but the ability of its people to perform in a way that will drive business results. The L&D function is responsible for developing workers' capabilities and ensuring their continued relevance. In fact, according to L&D professionals themselves, their top three responsibilities are to:¹

1. Develop employee knowledge, skills, and competencies
2. Increase organizational talent capabilities
3. Drive employee engagement and retention by providing personal growth opportunities

Unfortunately, by many accounts, L&D in general is not doing a great job with these responsibilities. The majority of L&D departments do not possess the required skills and capabilities. How do we know this? Recent research provides the following data points:

- Sixty-six percent of L&D professionals say that they are having trouble getting employees to engage with L&D offerings.²
- Less than one-quarter of line managers think that their L&D department is critical to achieving their business goals.³
- Only 14 percent of L&D leaders indicate that they are viewed as strategic business leaders; 52 percent are viewed as mediocre or worse.⁴

¹ For more information, *The Evolution of the High-Impact Learning Organization*, Bersin & Associates / David Mallon, Janet Clarey, and Mark Vickers, August 2012. Available to research members at www.bersin.com/library or for purchase at www.bersin.com/hilo.

² For more information, *The Real Challenge with Learner Engagement: L&D Has a Marketing Problem*, Bersin by Deloitte / Todd Tauber and Dani Johnson, January 2015. Available to research members at www.bersin.com/library.

³ Source: "Would You Recommend Your L&D Department?" *Chief Learning Officer* / Jay Cross, April 14, 2014, <http://www.clomedia.com/articles/would-you-recommend-your-l-d-department>.

⁴ For more information, *Key Findings – Become a High-Impact Learning Organization*, Bersin & Associates / David Mallon, Janet Clarey, and Mark Vickers, August 2012. Available to research members at www.bersin.com/library.

**KEY POINT**

L&D organizations may regain lost ground and more effectively help their businesses to compete by identifying and developing the capabilities required for enabling continuous learning.

So why are we in this state? L&D departments are not incompetent, but the evidence is mounting that many have failed to keep up with trends and developments. Business is moving at speeds never before seen. In order to compete, L&D organizations need to consistently upgrade their workers' skills—not yearly or monthly, but continuously. The majority of L&D work continues to focus on delivering discrete courses, not continuous learning—despite the evolution of L&D departments over the past 100 years.

For years now, we have heard that L&D needs to “upskill,” “retool,” or myriad other phrases which indicate that L&D departments are falling woefully short of their goals. L&D can regain lost ground and more effectively help their businesses to compete by identifying and developing the capabilities required to enable continuous learning.

Capabilities to Enable Continuous Learning

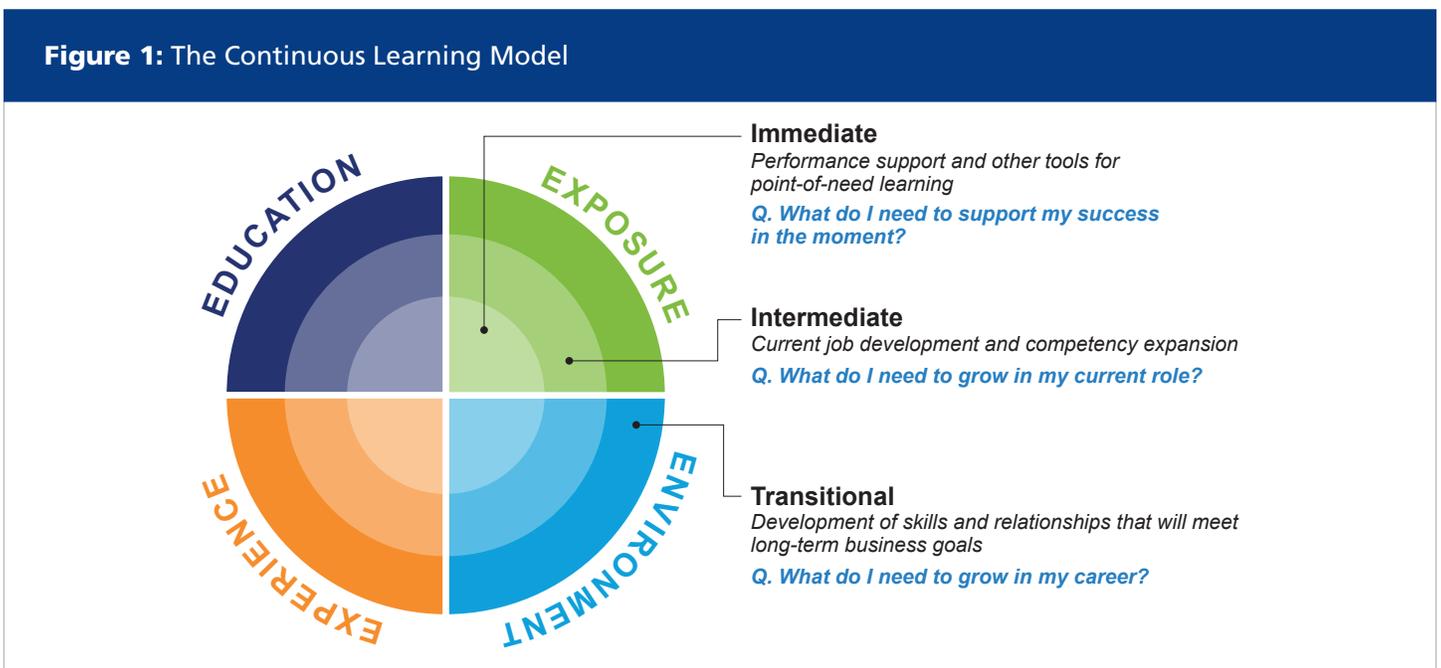
Traits of the modern learner and expectations that businesses have of their employees require L&D departments to think differently about learning. To provide some context for the discussion that follows, let us briefly cover the basics of Bersin's Continuous Learning Model.

The Continuous Learning Model

We define "continuous learning" as

"... structuring resources, expectations, and learning culture in such a way as to encourage employees to learn continuously throughout their tenure with the organization."⁵

Unlike traditional training, continuous learning should be a process rather than a series of programs (see Figure 1).



Source: Bersin by Deloitte, 2013.

⁵ For more information, *The Learning Architecture: Defining Development and Enabling Continuous Learning*, Bersin by Deloitte / David Mallon and Dani Johnson, May 2014. Available to research members at www.bersin.com/library.

Seasoned L&D professionals know that employees learn constantly and in many different ways. Our Continuous Learning Model takes the reality of constant learning into account in two ways:

1. The Model accounts for different types of learners' needs. For example, not all needs require a 30-minute e-learning course. Our Model classifies needs into three main categories, represented by the concentric circles shown in Figure 1.
 - **Immediate**—What learners need to be successful in their jobs right now
 - **Intermediate**—What learners need to progress in their current positions, expand their competencies, and develop their own career interests
 - **Transitional**—What learners need to meet long-term business goals or systemic jumps (such as a new role or a career shift)
2. The Model describes paradigms, or contexts, in which employees learn. Not all learning happens (or should happen) within the walls of a classroom. Our Continuous Learning Model addresses four paradigms, referred to as the "four Es."
 - **Education**—Encompasses elements we often think of in the context of learning and development. These elements generally have a defined beginning and end, and can be tracked.
 - **Experience**—Includes elements that generally occur while employees are in the workplace, and which may include stretch assignments, job rotations, and special projects.
 - **Exposure**—Comprises learning elements that involve interaction and relationships. It helps employees to develop by building connections with other professionals and thought leaders.
 - **Environment**—Covers tools, systems, and other infrastructure that employees use on the job to learn or support them in their work.

Methods for Continuous Learning

How can the Continuous Learning Model change things for L&D? For many years, the industry has talked about learning methods or assets in terms of formal and informal. Most recently, some leaders have spoken

of on-demand, social, and embedded methods. With the Continuous Learning Model, there is a new focus on the development of the learner in a holistic sense—not just formal learning. To better understand this change, take a look at Figure 2.

Figure 2: Learning Methods and Continuous Learning



Source: Bersin by Deloitte, 2015.

Most organizations focus on the education row at the top of Figure 2. Now, look at exposure, experience, and environment—and all of the learning methods and ways to reach and develop learners that are ignored if L&D's only focus is education. Moreover, many of the methods that appeal to the modern learner are found outside of the education row.

While L&D organizations are taking advantage of other methods, they do not use them enough. Learning methods in the categories of experience, exposure, and environment are usually either an afterthought or used sparingly—just enough to add interest and variety. In fact, more than 6 in 10 executives we surveyed last year described their companies as “weak” at using modern tools, like mobile and social learning, MOOCs⁶, and advanced media (such as video, gaming, and simulations).⁷



KEY POINT

The L&D professional's job is now to utilize continuous learning guidelines to create solutions that solve business problems and appeal to the learners themselves.

The L&D professional's job is no longer just to concentrate on delivering programs or courses. Instead, it is to create combinations of the learning methods shown in Figure 2 that both help solve business problems and appeal to the learners themselves.

However, the issue beyond these learning methods is the capability to incorporate them. Ask yourself, “How many of these learning methods can we confidently say that we can deliver, based on our current capabilities?” Our guess is that the number is lower than you would like. So, let us discuss the capabilities needed to actually get there.

The Focus of Current Capabilities

In our search to understand the capabilities required to enable continuous learning, we spoke with several companies' L&D departments and thought leaders, and reviewed the published competency and capability

⁶ “Massively open online course” (or MOOC) refers to a new category of vendor that provides open, no-cost (or low cost) online education and courseware. Initially, the MOOC market focused on providing academic-level courses to students around the world at little to no cost.

⁷ Source: *Corporate Learning Redefined: Preparing for a Revolution*, Deloitte Consulting LLP / Bernard van der Vyver, Bill Pelster, Josh Haims, and Josh Bersin, Deloitte University Press, July 2014. <http://www2.deloitte.com/us/en/pages/human-capital/articles/corporate-learning-redefined.html>.

models available.⁸ Our goal was to determine if there is a consensus regarding where L&D departments *should* be focusing their development.

We learned that there is some agreement. Of the models we reviewed, organizations seem to agree on about 70 percent of the capabilities that they feel are important to an L&D function. Not surprisingly, the alignment jumped closer to 80 percent when discussing capabilities associated specifically with designing and delivering training.⁹

We looked at the 18 capabilities compiled from these discussions and meta-research, and categorized them into the three high-level responsibilities of an L&D function as follows.



KEY POINT

L&D organizations have three major responsibilities—alignment with the business, effectiveness of learning methods, and efficiency of the learning function.

- 1. Alignment with Business Objectives**—Thinking strategically about the impact of learning initiatives on the culture, behaviors, and ultimately the bottom line of the business, and working with the business lines to maintain alignment.
- 2. Effectiveness of Learning Methods**—Making sure that the appropriate training methods are used properly with the correct audience, to meet the learning and development needs of the organization.
- 3. Efficiency of the L&D Function**—Utilizing L&D function resources, including time, money, and staff, to achieve maximum productivity in meeting learning and development needs.

These three responsibilities also conveniently align with those used to determine high-impact learning organizations. The 18 capabilities aligned with these three major responsibilities are shown in Figure 3.

⁸ While many models were reviewed, the main models utilized for this research are those we considered to be the most complete. These include the CIPD Profession Map (<http://www.cipd.co.uk/cipd-hr-profession/profession-map/default.aspx>), the ATD Competency Model (<http://www.astd.org/Certification/Competency-Model>), and the LPI Capability Map (<http://lpi.lexonis.com/review/1>). For those models that address more than just learning, capabilities pertaining to the learning function were considered.

⁹ Our High-Impact Learning Organization research is a series of industry studies, which are available to research members at www.berstein.com/library or for purchase at www.berstein.com/hilo.

Figure 3: L&D Capabilities

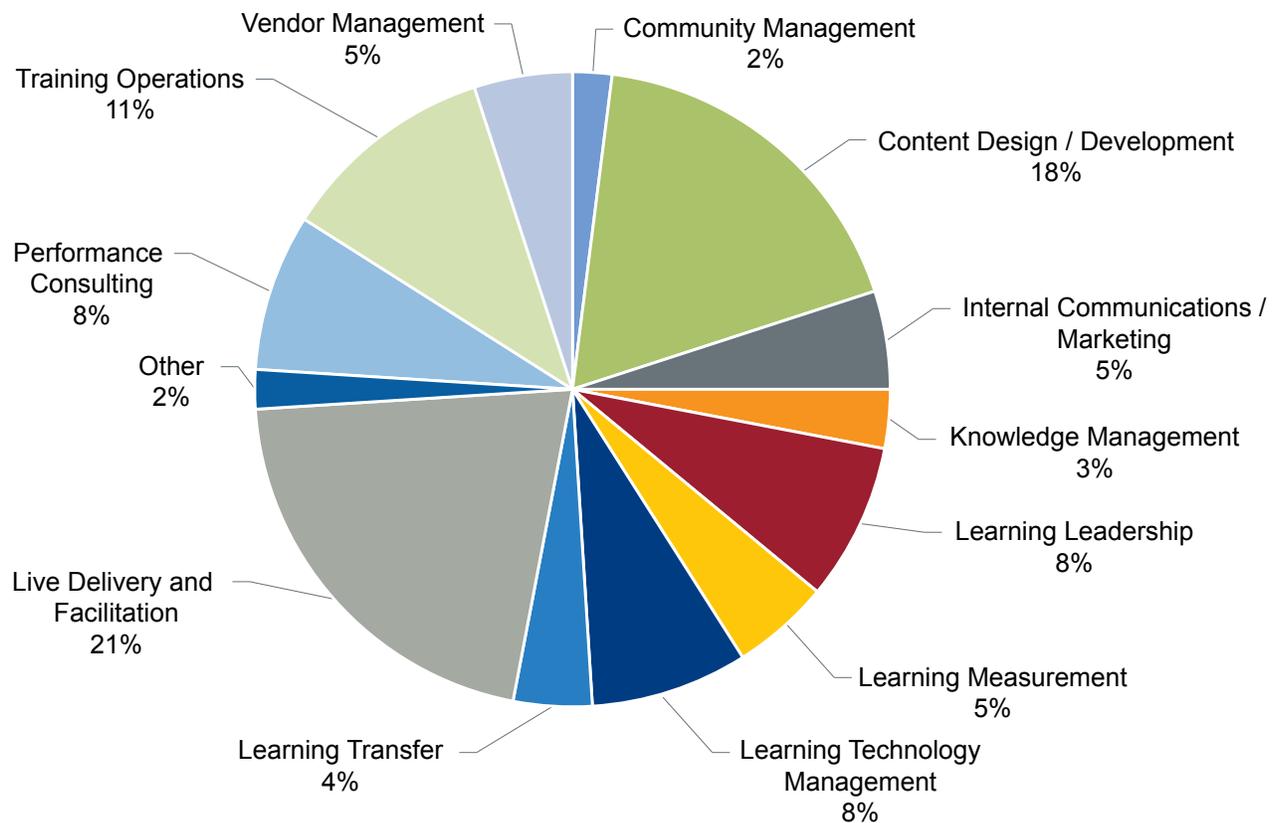
Alignment (with the business) 	Effectiveness (of learning methods) 	Efficiency (of the L&D function) 
Integrated Talent Management	Knowledge Management / Curation	Marketing / Communications
Performance Consulting	Training Delivery	Procurement / Manage External Resources
Performance Improvement / Support	Learning Technologies	Budget Allocation
Coaching / Mentoring	Instructional Design	Learning Strategy Development / Support
Change Management	Content Development	Quality / Process Improvement
Business Intelligence / Analytics	Information / Learning Architecture	Project Management

Source: Bersin by Deloitte, 2015.

L&D departments that effectively execute these capabilities can become high-impact learning organizations. In the next section, we further discuss each of the capabilities.

Current Resource Allocation

We know from our discussions that many L&D organizations feel a need to improve—to increase the number and depth of capabilities they possess. So how are they being allocated presently? Our High-Impact Learning Organization study data provides insights into the focus that L&D is giving to the capabilities already mentioned. Figure 4 shows the cumulative data related to the percentage of staff dedicated to fulfilling certain roles.

Figure 4: L&D Staff Allocation to Roles

Source: Bersin by Deloitte, 2015.



KEY POINT

Currently, L&D departments dedicate nearly 40 percent of their resources to live delivery, and content design and development.

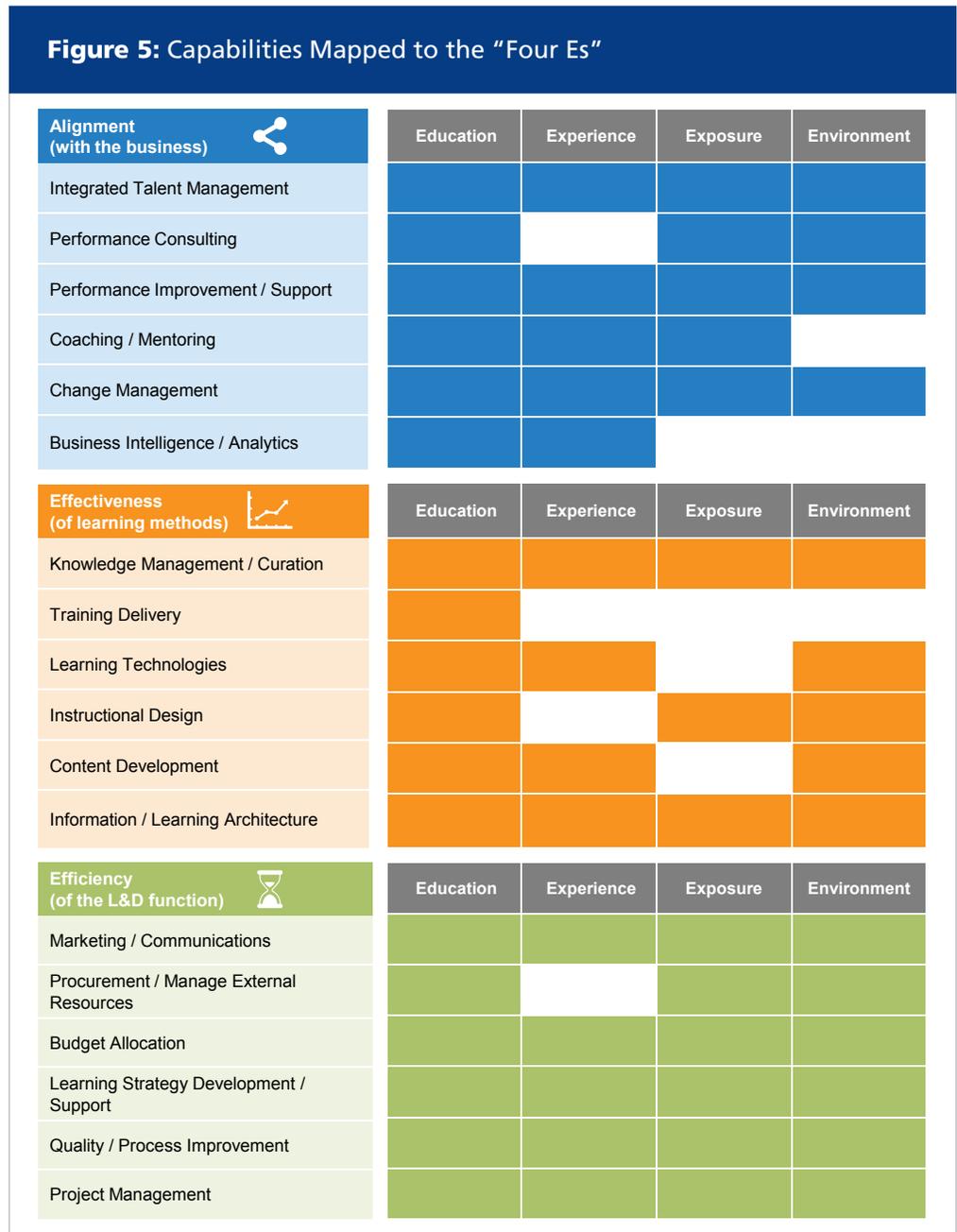
While there is not a one-to-one correlation with the capabilities we just discussed, Figure 4 does provide us with a sense for how L&D organizations consider their responsibilities. On the whole, L&D departments currently dedicate nearly 40 percent of their resources to fulfilling two roles:

- Live delivery and facilitation—21 percent
- Content design / development—18 percent

This is not surprising, since these are two key functions of the traditional L&D department. The qualitative data tells us that the majority of L&D departments still focus on the education aspect of continuous learning. It does show us, however, that an adjustment in mindset may be needed. L&D departments dedicated to delivering continuous learning will likely find that time, money, and human resources may need to be reallocated.

Aligning Capabilities to Continuous Learning

If organizational learning needs to become continuous and the L&D function needs to evolve in order to do so, then it may be helpful to know how well the capabilities listed earlier in Figure 3 could help L&D departments enable continuous learning. When we map each of the capabilities to the “four Es” in our Continuous Learning Model, we have something that looks like Figure 5.



Source: Bersin by Deloitte, 2015.

Which capabilities are required to enable continuous learning? The short answer is all of them that made our list. Some capabilities may play a bigger part, but all of them are required. As Figure 4 illustrates, the capabilities listed under the Effectiveness heading tend to receive the most focus by the majority of L&D departments.

However, enabling continuous learning goes beyond effectively applying learning methods. It should also require the L&D function to align with the business in order to help it to deliver the strategy—to understand what the needs are and incorporate learning into the culture that addresses those needs. L&D departments should also be good and efficient stewards of their given resources—allocating them in a way that will do the most good, while effectively communicating their strategies to the rest of the organization.

Unfortunately, our discussions tell us that, while the alignment and efficiency capabilities are acknowledged, there is not always a focus on them. This lack of focus may be the reason that L&D often struggles with credibility—not because L&D professionals lack talent as instructional designers, but rather, because they often fail to focus on the business.

Alignment between continuous learning and L&D capabilities will be the topic of further quantitative research.

Where Should I Focus First?

While each is crucial in its own way, we understand that you cannot address all 18 capabilities at the same time. Your company is unique in its current maturity level, as well as with regard to the challenges faced in your business and industry. Thus, addressing this topic as a one-size-fits-all solution will not do.

We hope that the structure we introduced in Figure 5—categorizing the capabilities in terms of those needed to enable alignment, effectiveness, and efficiency—will be useful in helping you to determine where to begin. While it may not be clear which *capability* an L&D organization should focus on, you should know which *responsibility* may need more attention.

In this section, we delve into each of the capabilities by providing a definition and some high-level proficiencies that L&D departments should possess in order to enable continuous learning. We also provide insights into new roles that are appearing in some of the companies we surveyed.

Alignment with the Business

While alignment with the business has received more focus in the past few years, there is still a lot of work to do. With this increased responsibility, businesses also have an opportunity to build the credibility of the L&D function.

Figure 6: Capabilities for Aligning with the Business

Capability	Definition	Proficiencies
Integrated Talent Management	Work hand in hand with the talent management function to ensure that learning opportunities align with organizational objectives and are integrated with talent processes (e.g., performance management, career paths, etc.). They should also ensure that managers have the right tools, information, and capabilities to develop their people.	<ul style="list-style-type: none"> • Sound understanding of talent and development goals for the organization, and the alignment and maintenance of L&D priorities and strategy to meet these goals. • Partnership with talent management, HR, and line leaders and managers to address current and future performance needs. • Recognition and incorporation of business measures that are affected by L&D actions and initiatives (e.g., retention, engagement, readiness, high potentials, etc.).
Performance Consulting	Actively consult with business leaders and other internal customers to diagnose performance issues and develop appropriate solutions—whether the solution contains a learning component or not.	<ul style="list-style-type: none"> • Business acumen that enables excellent understanding of and communication with those outside of the learning function. • Engagement with business stakeholders in the planning and strategizing phase of new initiatives (not after the fact). • Establishment of and adherence to processes for discussing organization mission, strategy, and goals with key stakeholders, and the ability to identify, propose, and implement nontraditional solutions for performance issues as necessary.
Performance Improvement / Support	Have a process for examining performance gaps and for closing those gaps. L&D should be able to provide support tools to aid managers and employees at the point of need.	<ul style="list-style-type: none"> • Examination of behaviors, processes, and environment that affect the area of performance to be improved and performance evaluation related to current performance levels. • Understanding of the tools and processes in place within the organization that can be leveraged to improve performance. • Effective working relationship with business leaders to gain buy-in and support for performance improvement and support measures.

Source: Bersin by Deloitte, 2015.

Figure 6: Capabilities for Aligning with the Business (cont'd)

Capability	Definition	Proficiencies
Coaching / Mentoring	Be able to effectively “coach the coach,” or provide managers and other leaders with the skills required to instill and correct behaviors of their employees. This includes providing tools, templates, and counsel to help to implement behavior changes.	<ul style="list-style-type: none"> • Excellent communication skills—speaking, writing, and listening. • Identification and exhibition of desired behavior for coaches, particularly in experience- and exposure-type learning activities. • Ability to help stakeholders to understand the benefits of behavioral changes, and to motivate them to take appropriate steps.
Change Management	Be able to guide change initiatives within the organization through their broad reach across other functions and their knowledge of how to facilitate change in the organization.	<ul style="list-style-type: none"> • Successful influencing and project / program management with other stakeholders affected by the change, including business line, HR, talent management, etc. • Ability to identify and create motivating learning elements and communication pieces to aid behavior change. • Effective communications with the larger organization regarding the change, its necessity, and the benefits to both individuals and the organization at large.
Analytics / Business Intelligence ^{10,11}	Be able to select appropriate measurement and evaluation strategies, manage data collection, and interpret data to report to a variety of stakeholders. L&D should have processes in place to use internal data, as well as business intelligence and insights, to make appropriate decisions.	<ul style="list-style-type: none"> • Business acumen to understand how learning initiatives can be linked to improving business and individual performance. • Knowledge of various learning measurement models and their effectiveness, as well as statistical and analytical techniques used for conducting analyses. • Consultant mindset for interacting with business leaders, understanding their problems, asking the right questions, and creating solutions. • Ability to “tell the story”—clear and convincing communication of findings, and their implications to the organization, including data visualization techniques.

Source: Bersin by Deloitte, 2015.

¹⁰ For more information, *The Essential Skills for Talent Analytics Teams*, Bersin by Deloitte / Karen O’Leonard, October 2014. Available to research members at www.bersin.com/library.

¹¹ For more information, *Bridging the Gap to Data-Driven Decision-Making*, Bersin by Deloitte / Karen O’Leonard and Josh Janjua, September 2014. Available to research members at www.bersin.com/library.

As the statistics in the beginning of this report indicate, there is still work to do in order to align L&D functions with the business. Some capabilities required for business alignment are established and recognized (such as coaching and mentoring, and performance support). Others, like analytics / business intelligence and change management, are just finding their way into L&D consciousness, vernacular, and budget. Some are still evolving.

Emerging Role

As more pressure is put on the L&D function to demonstrate its value to the organization, we see more effort being put into developing capabilities associated with alignment to the business. Particularly, one role that requires specific skills sets is receiving quite a lot of attention.

Business (née Performance) Consultant

The business consultant role is not so much emerging as it is being revamped. Performance consulting developed in response to the training recession in the late 1990s. L&D departments were seen largely as order-takers and were having a hard time showing their value to the business. Performance consulting became a way to align the training practices with the business and its needs. Traditionally, this role was filled by someone with a strong learning background, and focused on tasks, such as needs assessment, root-cause analysis, and the like.

In recent years, performance consulting has definitely moved L&D into closer alignment with the rest of the business; organizations that execute this role particularly well do some things a little bit differently. Many such companies designate what used to be a *performance* consultant as a *business* consultant instead. While the distinction may be lost on some, it is not just a title change. The business consultant's job is not only to understand what the company is trying to accomplish and then make recommendations—it is also to help the business figure out what it is trying to achieve in the first place. This shift takes a different and slightly expanded skills set than the original performance consultant.

As such, business consultants focus on:

- Building strong relationships with the business line and becoming trusted partners for achieving business results

- Working with the business to identify specific skills or gaps that are negatively impacting the business and helping to identify actions that will improve overall business performance
- Looking more holistically at the business and recommending actions that may or may not include a training element

L&D leaders often recruit business consultants from outside of their department and sometimes even outside of their organization. Many seek to fill this role from the business lines themselves, so that they can capitalize on existing relationships, while others find the consulting industry to be a good source for recruiting.

The Role in Context: Existing Leaders Become Practical Liaisons

MillerCoors has taken a unique approach to partnering with the business. In lieu of hiring consultants from the outside or training those with existing L&D expertise, the company has formed a role called “learning leader.” The new role involves inviting business leaders from different functions (for example, sales and marketing) to take on roles in the learning organization for one- to two-year rotations.

During these tours, learning leaders are members of the L&D organization, partnered with a particular function to lead the design and delivered and embedding of the functional learning plan. Learning leaders understand the daily challenges and pressures faced by the business, and can provide valuable insights into the knowledge and skills needed to meet those challenges. This role, paired with an adult learning expert within the MillerCoors University Operations team, helps L&D to create learning experiences that are less theoretical, and more focused on practical challenges and situations. 

Effectiveness of Learning Methods

Capabilities within the effectiveness of learning methods are most associated with classic learning and development. The functions of

managing knowledge, delivering training, and designing learning are not going anywhere; in fact, they are increasingly crucial, but maybe just not in the traditional sense.

Despite the changes we have seen in L&D over the years, the majority of work continues to focus on delivering discrete courses, not continuous learning. Given that the majority of processes, systems, and technology and tools all support this type of delivery, this is not surprising.

However, it's time to change. Given the preferences of the modern learner and the new expectations on L&D, these capabilities need a redesign. Figure 7 defines the capabilities associated with the effectiveness of learning methods and provides skills associated for each.

Figure 7: Capabilities for Effectiveness of Learning Methods

Capability	Definition	Proficiencies
Knowledge Management / Curation	Encourage knowledge-sharing and collaboration, including implementing technology and processes for capturing and sharing intellectual capital with colleagues and peers across functions and locations.	<ul style="list-style-type: none"> • Designing and managing learning and knowledge repositories to which learners have access within your organization (i.e., SharePoint, LMS, LCMS, etc.). • Curating and organizing information to make it accessible to learners. Assurance that information is up to date and relevant (i.e., driving the business strategy). • Establishing groups, organizations, technology, etc. to help information to flow more freely across functional boundaries.
Training Delivery / Facilitation	Possess the skills to deliver and facilitate live classroom and virtual programs or modules.	<ul style="list-style-type: none"> • Excellent in-person presentation delivery skills, using voice, body language, presentation design, and technology to make an impact. • Live online presentation skills that adapt to multiple online environments. • Skills required to manage the "room," drive interaction and engagement, and synthesize / catalyze insights from the interaction.
Learning Technology	Understand and apply appropriate learning technologies to facilitate learning and development within the organization. L&D should consider all four "Es" of the Continuous Learning Model and the types of technology that may be available / required for the chosen learning methods for each "E."	<ul style="list-style-type: none"> • Expertise in learning technology platforms and their integration with other systems, as well as familiarity with other technology tools that can be integrated or leveraged for informal learning (e.g., social platforms, YouTube, Twitter, blogs, etc.). • Recognition of the difference between sound learning technology which is beneficial to the organization versus the "bells and whistles" that are shiny, but not required. • Experimentation with new technologies and techniques to expand the boundaries of the learning technology ecosystem.

Source: Bersin by Deloitte, 2015.

Figure 7: Capabilities for Effectiveness of Learning Methods (cont'd)

Capability	Definition	Proficiencies
Instructional Design	Be well-versed on adult learning theory and instructional design, and how they apply to continuous learning. Further, L&D departments should stay abreast of both L&D trends and the latest research regarding L&D, and modify applications as required.	<ul style="list-style-type: none"> • Skills associated with learning design and creation across various media and technology. • Effective implementation of sound, up-to-date instructional design principles for education, exposure, experience, and environment learning practices within the organization. • Technical skills (such as coding, video production, animation, etc.) to turn ideas into reality.
Content Development	Be able to effectively engage with subject-matter and functional / technical resources to ensure the correct content is developed in a way that will address the needs.	<ul style="list-style-type: none"> • Effective building and managing of teams of internal and external resources (e.g., contractors, freelancers, vendors, subject-matter resources, etc.). • Ability to capture key information in a format that can be utilized for the learning method being utilized.
Learning Architecture	Actively define and manage the learning architecture, or its "unique map of agreed-upon learning needs, learning strategies, and delivery strategies for all of its approaches to development." ¹²	<ul style="list-style-type: none"> • Knowledge of information architecture techniques, including the ability to adapt system infrastructures to meet learner needs.¹³ • Ability to make tradeoffs based on the decision framework provided by the learning architecture. • Reflection of the culture and values of a business throughout the components of the architecture, including solutions, approaches, required disciplines, technology, and processes. • Continuous evolution of the learning architecture to ensure that it continues to meet learner and business needs.

Source: Bersin by Deloitte, 2015.

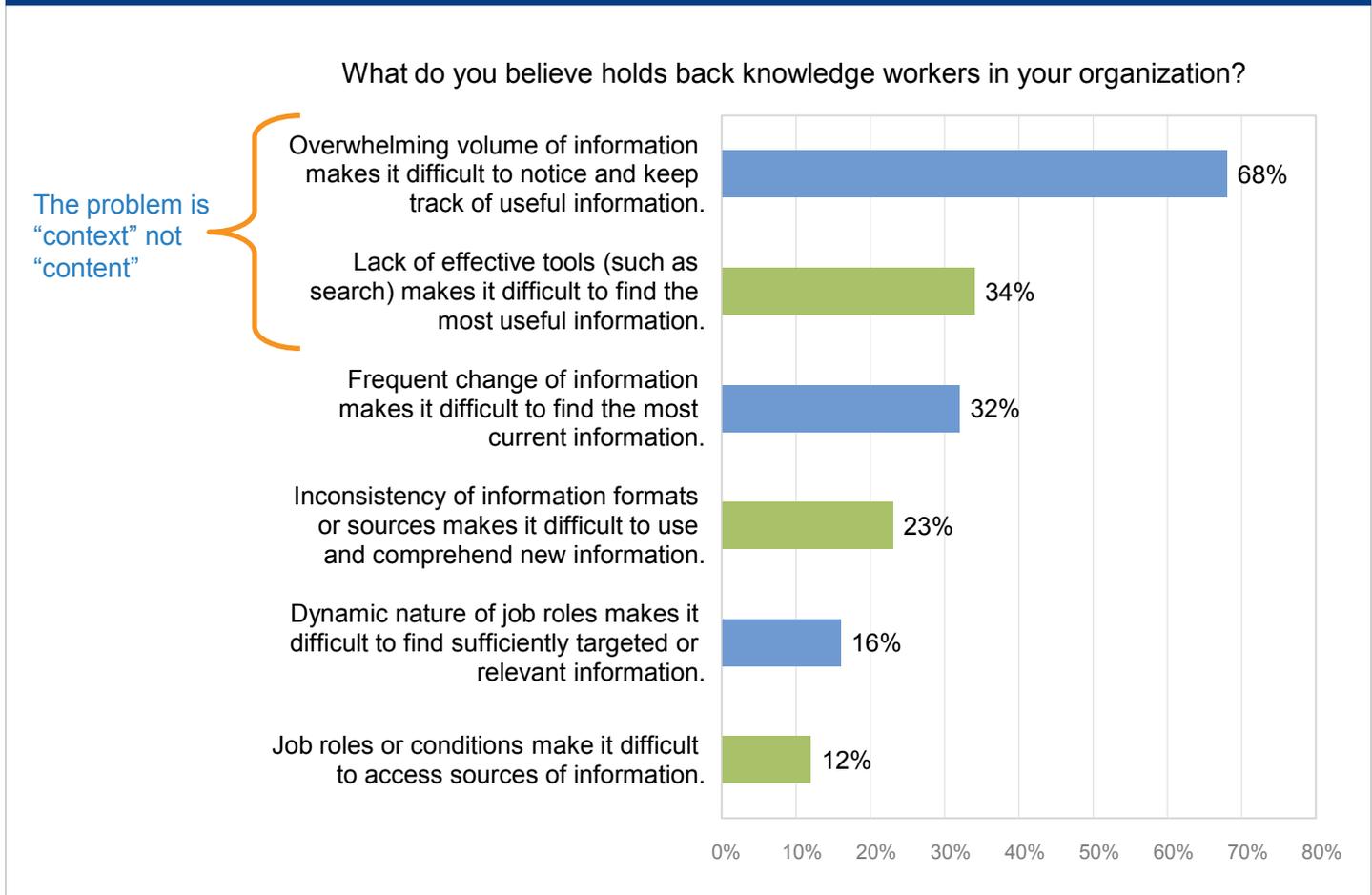
The interesting thing about the capabilities listed here and some of the skills that fall under them is their focus. While we have spent the last decade focusing on content creation and distribution, we are just now starting to realize the importance of the learning experience, and that relevant content can be bought or found.

¹² For more information, *The Learning Architecture: Defining Development and Enabling Continuous Learning*, Bersin by Deloitte / David Mallon and Dani Johnson, May 2014. Available to research members at www.bersin.com/library.

¹³ For more information, *The Learning Architecture: Defining Development and Enabling Continuous Learning*, Bersin by Deloitte / David Mallon and Dani Johnson, May 2014.

In fact, a question we asked in our High-Impact Learning Organization research speaks to this very point. When we asked the question “What do you believe holds back knowledge workers in your organization?,” company leaders responded as follows (see Figure 8).

Figure 8: Challenges of Knowledge Workers



Source: Bersin & Associates, 2012.



KEY POINT

The overwhelming amount of information, coupled with the lack of effective tools, holds back knowledge workers.

The two top responses indicate that the problem is not necessarily that useful content is unavailable, but rather this content is difficult to find and track. The results speak to the importance of having capabilities in the areas of curation and learner experience.

Emerging Roles

Not surprisingly, then, the two emerging roles we see in this group of capabilities focus on curation and learner experience.

Content Curator

Millions of pieces of data and knowledge exist, and can be accessed both inside the organization and on the open web. Learners, however, have difficulty finding what they want when they want it and in the right format. Seventy-five percent of information professionals think it is easier to find knowledge outside of their organization than within it.¹⁴ This can lead to frustration and greatly diminish the user's experience (as well as L&D's reputation).

To counteract this, some organizations are implementing the role of curator. This role focuses specifically on determining if information is up to date, accessible, applicable, and in a format that appeals to the learner. The concept in itself is not new—marketing departments and those with an online presence (also, anyone who uses Pinterest and similar applications) have been curating for quite some time.

Curators focus on three main tasks:

1. Aggregating the most useful information (both internal and external) into one location and organizing it, so that it can be easily found
2. Contextualizing gathered information by tagging, ordering, commenting, adding background or knowledge information, and rating the content
3. Maintaining the information and learning assets, so that they remain relevant and up to date

In many cases, this role replaces (or is added to) that of content creators. Organizations are realizing that it often makes more sense to use off-the-shelf, free, or existing content instead of creating it. They also need to point learners in the right direction and give them the necessary resources to make sense of the new information.

UX Designer

In the L&D function, a user-experience (or UX) designer's responsibility is to ensure an engaging learning environment that increasingly relies

¹⁴ Source: "Few Organizations Have Strong Internal Search Capabilities," CMS Wire / Kelly Bilodeau, November 14, 2014, http://www.cmswire.com/cms/information-management/few-organizations-have-strong-internal-search-capabilities-027201.php?utm_content=buffer3ebab&utm_medium=social&utm_source=twitter.com&utm_campaign=buffer.

on digital tools including e-learning, apps, portals, an LMS, and the like. Why is this important? A good UX design helps reduce friction (or things that detract from learning) and increase motivation, both of which cater to the overall learner experience.

UX designers work with IT specialists and instructional designers, and focus on two main areas:

- **Design and Functionality**—UX designers focus on the type of experience that the learner will have with the application through both interaction and visual design
- **Goals versus Tasks**—UX designers have the ability to look at an application holistically, and create something that incorporates the right interactions, animations, visual aspects, and flow to appeal to learners and meet their needs

UX designers are often employed by, or in conjunction with, digital content providers, web designers, and mobile app designers. Chances are good that your chosen learning vendors also have a UX designer on staff.

Efficiency of the L&D Department

The final group of capabilities we address in this report concern the efficiency of the L&D function. While these capabilities may seem obvious and familiar to L&D professionals (particularly to L&D leadership), they have received less focus (or are at least underdeveloped) in recent years.

In fact, data gathered with the LPI Capability Map indicates that L&D professionals rated their aptitude in business skills and intelligence as just 2.58 on a scale of 1 to 4,¹⁵ or by American academic standards, a solid “D.”¹⁶

However, this group of capabilities has never been more important. L&D organizations are focusing more on becoming enablers of organizational learning, not just content providers, which makes efficiency crucial. Executing these capabilities well makes certain that the appropriate resources (e.g., time, budget, and human resources) are pointed at the right business problems, and that the mission and priorities of the L&D function are clearly communicated to the organization.



KEY POINT

L&D organizations are focusing more on becoming enablers of organizational learning, not just content providers, which makes efficiency crucial.

¹⁵ Learning and Performance Institute’s business and intelligence category includes financial management; procurement; communication, marketing, and relationship management; and industry awareness. While these capabilities do not align exactly with the efficiency of the L&D function capabilities, it does provide insights into how L&D professionals perceive their own aptitude in these areas.

¹⁶ Source: *Learning Survey 2014*, Report Learning and Performance Institute, www.lpi.org.

Figure 9 defines the capabilities in this group and suggests some of the high-level skills that organizations should have with respect to each.

Figure 9: Capabilities for Efficiency of the L&D Function

Capability	Definition	Proficiencies
Marketing / Communication	Be able to actively promote L&D and its learning opportunities by clearly defining L&D's value to the organization, providing positive, useful experiences with learning, and ensuring engaging, consistent, and relevant content and materials.	<ul style="list-style-type: none"> Ability to clearly communicate the value that L&D brings to the organization—on both business and learner levels. Continuously improve the learner experience by soliciting feedback, conducting focus groups, market testing, etc. Ability to understand audience needs, wants, preferences, and habits.
Procurement / Manage External Resources	Be able to efficiently and effectively source and manage external vendors and contractors.	<ul style="list-style-type: none"> Selection of vendors based on their ability to deliver on time, within budget, and within scope. Ability to carefully scope (in terms of budget, time, and desired outcomes) and prioritize requirements for work that will be outsourced to vendors. Ability to hold vendors accountable to budget, timeline, and scope associated with outsourced projects.
Learning Strategy Development / Support	Align the overall learning and development strategy with the business strategy, and make resource investment decisions based on this alignment.	<ul style="list-style-type: none"> Analysis of the climate of the larger organization and industry to determine how L&D can best assist. Goal-setting for the L&D organization that aligns with corporate initiatives and priorities.
Budget Allocation	Allocate its overall budget based on the priorities of the business.	<ul style="list-style-type: none"> Accurately determine where budget should be spent to have the greatest impact, given industry and business climate. Track and report on budget expenditures. Determine L&D roadmap and ensure the appropriate budget for the development of the roadmap five years forward.
Quality / Process Improvement	Analyze and improve existing processes and programs to more fully meet business goals and objectives.	<ul style="list-style-type: none"> Deep understanding of the metrics utilized to assess quality of learning initiatives. Process in place for receiving continuous feedback on learning methods and assets, as well as interactions with the L&D function. Adjustment of processes as necessary to encourage experimentation and innovation in the L&D department.
Project Management	Plan, organize, inspire, and control time and budget associated with the creation of new initiatives or programs.	<ul style="list-style-type: none"> Solid communication skills—written and verbal. Ability to manage resources (e.g., time, people, budget) to ensure projects are on track. Ability to obtain buy-in and support from stakeholders. Ability to accurately assess risks involved in projects.

Source: Bersin by Deloitte, 2015.

Emerging Roles

With this new push for efficiency and organization, we want to highlight two new roles—product manager and communications manager.

Product Manager

One of the surprising, but completely logical, roles that we have seen emerge to enable L&D departmental efficiency is that of a product manager. In the past few years, the renewed focus on the learner and the learner's experience has prompted organizations to see benefits in viewing learning offerings as products—which should be managed, updated, and, of course, marketed.

While the execution of this role is slightly different across the organizations we talked to, it usually has at least the following responsibilities:

- Acting as a liaison (and a “push” where necessary) to the IT department to integrate new learning technology tools with the technology roadmap
- Enabling the learning team by vetting and providing tools that make continuous learning possible within the organization
- Taking responsibility for learning products, making certain of their viability, format, execution, and use—and focusing on the products as part of a well-rounded, continuous learning experience

Many L&D departments recruit product managers from other functions, such as marketing, product development, IT, and technology industries.

The Role in Context: Streamlining Learning Technology

When a large financial services company decided to improve its learning and development offerings, it became quickly apparent that technology would play a large role. In fact, in the last four years, 10 new learning technologies have been added to its L&D's arsenal. The company created a product management function to make sure that these technologies would be handled correctly.

The Role in Context: Streamlining Learning Technology (cont'd)

Product management sits between the core L&D and IT teams—and focuses on vetting, implementing, installing, and upgrading learning technologies. These product managers have a sound understanding of both technology and L&D, and can, therefore, facilitate discussion and cooperation, as well as push back and advise both teams as necessary.

Further, product management tries to understand how learners would like to learn and then finds appropriate technologies. To confirm that these technologies are appropriate and will work within the given IT infrastructure, they are often tested within IT first before they are rolled out to the rest of the organization. The product management function allows the organization to adopt and adapt to new learning technologies more quickly. Essentially, this role has enabled the core L&D team to better meet business and learner needs. ↻

Communications Manager

Brands are important because they can inspire, influence, and compel people (for example, workers and managers who do not carve out room for training) to focus their time and attention on particular choices. Branding is more than just creating names, logos, and taglines; it influences how consumers (e.g., employees and managers) think of a company, and its products and services—what they expect, what they experience, and what they remember.¹⁷

Our research tells us that L&D functions, which are viewed as proactive and strategic, dedicate about 27 percent more resources to marketing and communications, portfolio management, and leadership.¹⁸ It makes sense, then, that a role which is responsible for actively managing the perception of learning and the L&D function may be beneficial.

¹⁷ For more information, *Three Marketing Lessons for Learning & Development*, Bersin by Deloitte / Todd Tauber, June 24, 2014. Available to research members at www.bersin.com/library.

¹⁸ For more information, *The Corporate Learning Factbook 2014: Benchmarks, Trends, and Analysis of the U.S. Training Market*, Bersin by Deloitte / Karen O'Leonard, January 2014. Available to research members at www.bersin.com/library or for purchase at www.bersin.com/factbook.

Communication managers do that by:

- Providing consistent, overall messaging for the L&D department
- Improving how learners perceive learning, including their purpose and priorities, and engaging them in the learning process
- Branding the learning function within the larger organization—especially making sure that the look and feel, identity, and overall learner experience are consistent and on message
- Clearly communicating L&D's purpose and priorities to the rest of the organization

Role in Context: Communicating L&D's Mission

BNY Mellon is one of the world's largest financial services companies. Founded in 1784 by former U.S. Treasury Secretary Alexander Hamilton, it provides investment management, investment services, and wealth management to corporations, family offices, and governments.

In more recent years, BNY Mellon began searching for ways to streamline and transform its learning and development function from one that was largely decentralized to one that was much more centralized. One of the results of this reorganization was the creation of BNY Mellon University, a cross-company organization dedicated to delivering L&D solutions. The goal of the university would be to empower people to achieve strategic business outcomes.

As a part of this change, the leaders of BNY Mellon University felt that it was important to create a communications role for the L&D function. The communications manager is a member of the marketing and corporate affairs division in the company, but is embedded with L&D. Two important aspects of this role include:

- **Increasing Visibility within the Company**—The communications manager understands the initiatives and priorities of BNY Mellon University, as well as the tactics it implements each year to support those strategic priorities,

Role in Context: Communicating L&D's Mission (cont'd)

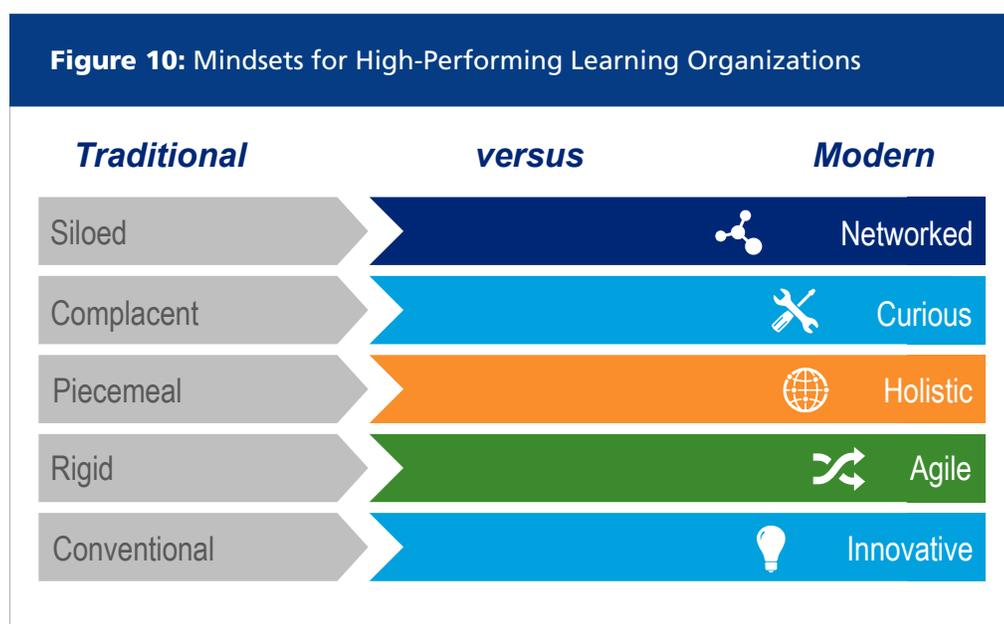
in order to reinforce and promote them across the entire company. This is often done by working through the existing communications channels at the corporate level, as well as through the business line and regional vehicles. Messages delivered through these familiar channels are more likely to receive the attention they deserve.

- **Heightening the Company's Reputation**—The communications manager also works with business leaders within BNY Mellon University to support its external communications, including speeches, conferences, articles, and white papers. By highlighting the major strides that the university is making within the company, external audiences have a better understanding of how BNY Mellon is focusing its efforts on delivering superior client service through learning and development programs.

The communications manager role at BNY Mellon has streamlined and enhanced communication regarding learning initiatives. Because the role is embedded within L&D, messages about learning and learning offerings are more clearly aligned to the financial institution's strategic initiatives, and more easily disseminated throughout the organization and beyond. 

Mindset Shifts

So far, we have discussed what L&D functions should *do* in order to enable continuous learning. However, organizations with admirable learning capabilities go one step beyond simply *doing* the right things—and focus on *how* they do them. These organizations tend to have a different mindset (or set of mindsets). Figure 10 shows some of the more common shifts in thought.



Source: Bersin by Deloitte, 2015.



KEY POINT

The mindset of L&D professionals is increasingly important to learning leaders—often more important than particular skills or competencies.

These mindsets are becoming increasingly important to learning leaders. In fact, some consider an employee's mindset to be more important than particular skills, and probe to ensure that potential new hires possess attitudes that align with that of the company. Let us briefly review each one.

From Siloed to Networked

One of the major differences between continuous and more traditional learning methods is ownership. In the past, L&D departments oversaw a good chunk of the ideation, creation, execution, and delivery of learning initiatives—but continuous learning involves a much broader range of stakeholders and participants. Managers are responsible for delivering and following up on experiential activities. The learners are responsible for taking advantage of exposure activities that will build their networks.

Thinking about their work in terms of continuous learning requires L&D departments and individual L&D professionals to be further networked than more traditional models. L&D should focus on building those networks and relationships that will enable a closer tie to the business.

Also, as mentioned earlier in this report, we have seen the focus placed on capabilities that are not traditional L&D capabilities (such as technology, marketing, finance, etc.). Building strong networks and relationships across the organization can provide the L&D function with access to subject-matter resources and / or resources to help in building those capabilities internally.

Tips:

- **Management**—Ensure that the L&D function takes an active role in talent management, leadership, and strategy discussions. Actively work to build the credibility of your department.
- **L&D Professionals**—Actively work to increase your network both internally and externally. Find others within your organization (perhaps in different functions) who do similar work and develop those relationships.

From Complacent to Curious

The final mindset shift we want to address is that of complacency to curiosity. Again, the organizations we see that are adapting well to their new reality are those which have a sense of curiosity in everything they do. This curiosity leads to new ways of doing things and, in some cases, in L&D creating expertise in areas outside of the traditional L&D function—to the extent that they are often called upon for their advice or guidance.

Insatiable curiosity on the part of L&D professionals helps drive them to stay current on the latest and greatest trends, and on market and industry forces—which can open their minds to new and better solutions.

Tips:

- **Management**—Allow time and resources for curiosity. Encourage L&D professionals to ask why, find answers, and share with others.
- **L&D Professionals**—Spend at least 30 minutes of your day reading and exploring—not just L&D publications, but business publications, creative publications, websites, apps, and tools. Jot down ideas that come to mind. Find ways to experiment with them in your work.

From Piecemeal to Holistic

Delivering continuous learning is dependent on the L&D department's ability to think holistically, regardless of particular roles within the function.

- Business (performance) consultants should be able to think outside of learning and evaluate other motivations / solutions that could be implemented to solve business problems.
- Instructional designers, content developers, and curators should be able to consider a holistic learning experience, utilizing appropriate learning methods from the “four Es,” instead of defaulting only to education.
- Product managers / learning technology specialists and UX designers should be able to think through how technology solutions work together to create seamless experiences.
- Learning leaders should be able to think about overall business challenges that their organizations are trying to address. They need to allocate funds to where it will have the most impact and also effectively communicate this to the rest of the organization.

To summarize, the L&D function and L&D professionals, specifically, should have a “greater-than-us” approach to their work—ensuring that their actions are moving toward the greater good.

Tips:

- **Management**—Change the vocabulary. Do not talk about courses, programs, or learning initiatives. Start talking about business challenges being addressed using the “four Es” (education, experience, exposure, and environment).
- **L&D Professionals**—Change thought processes, so that you think general to specific. Utilize tools, like mind maps, cause / effect analysis, and others, to begin to think differently about your work.

From Rigid to Agile

L&D should become more agile. With the speed of business, it is often impossible to allow the learning and development team to spend six months creating the perfect learning initiative. Rather, the company often requires L&D to respond to immediate needs to keep the business moving forward.

We mentioned earlier that one of L&D’s primary goals is efficiency—training the most people to perform the task in the most economical way possible. However, in order to become agile, L&D should rethink its mindset. While defining processes, realigning relationships, and retooling templates may be involved on an organizational level, individual L&D professionals also need to feel empowered to make decisions that will help to keep them flexible.

Tips:

- **Management**—Empower and expect your teams to do things differently.
- **L&D Professionals**—Constantly (and respectfully) question established processes rather than saying, “Because that’s the way we do it.”

From Conventional to Innovative

Of the organizations we have talked to recently, the ones we admire the most are those that are not afraid to experiment. L&D has a history and a methodology, but some of the most innovative things we have seen are from companies with learning leaders who threw out the rule book and decided to try some new things.

Employees now work and learn differently, both out of necessity and preference. Some of the conventional methods embraced by L&D are outdated, at least in their execution. L&D should be brave enough to break some of those molds and to try out different ideas. Some will work; some will not. But, if nothing else, the department will hopefully gain the ability to think outside of the staid processes and existing tools in order to meet business needs.

Tips:

- **Management**—Give your team permission and time to try new things. Use your own team as guinea pigs and iterate.
- **L&D Professionals**—Explore and look at design websites, web tools, and apps to collect new ideas; incorporate some of these into your work.

We have discussed capabilities in-depth. However, many of the learning leaders we talked to value mindsets over the capabilities which newly hired employees possess—stressing that it is easier to build capabilities than it is to change mindsets.

Conclusion

We started this report by explaining that L&D (as a whole) has not kept up with the rest of the business. In fact, the capability gap between the importance of learning as an issue and the ability to respond grew in magnitude by 211 percent in 2014.¹⁹ Within many organizations, neither learners nor business leaders are happy with L&D, as L&D professionals have been too complacent and have worked in isolation for too long. If we are to remain relevant, we cannot ignore the need to grow and evolve our skills sets as individuals, as well as our capabilities as a function.

The good news is that we know the direction in which we need to go. We know we need to enable continuous learning for workers in order to make sure that they have the skills and abilities to move the business forward. In this report, we discuss the capabilities that we need to develop to help the business succeed—and we review the mindset shifts which can help us to apply those capabilities in new and innovative ways.

A fair amount of trepidation exists among some organizations, though. The future is unknown; doing things differently can be intimidating; gaining enough credibility to move forward will be challenging. However, we also sense a great deal of excitement. As L&D professionals, we have the opportunity to reinvent ourselves, from order-takers to consultants, and course creators to problem-solvers—and the function itself, from boring, sad cost-centers to inventive, engaging, enablers of the business.

¹⁹ Source: *Global Human Capital Trends 2015: Leading in the new world of work*, Deloitte Consulting LLP and Bersin By Deloitte, Deloitte University Press, March 2015, <http://www2.deloitte.com/us/en/pages/human-capital/articles/introduction-human-capital-trends.html?id=us:em:na:hct15:awa:cons:040315>.



KEY TAKEAWAYS

- Changes in work, technology, and access to information mean that L&D departments need to reinvent themselves.
- L&D may regain lost ground and more effectively help the business to compete if it can identify and develop capabilities required for enabling continuous learning.
- The L&D professional's job is now to utilize continuous learning guidelines to create solutions that solve business problems and which appeal to the learners themselves.
- L&D organizations have three major responsibilities—alignment with the business, effectiveness of learning methods, and efficiency of the learning function.
- Currently, L&D departments dedicate 40 percent of their resources to live delivery, and content design and development.
- The overwhelming amount of information, coupled with the lack of effective tools, holds back knowledge workers.
- L&D organizations are focusing more on becoming enablers of organizational learning, not just content providers, which makes efficiency crucial.
- Mindsets of L&D professionals are increasingly important to learning leaders—often more important than particular skills or competencies.

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