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Introduction

**Learners**, a term we use throughout this report, are the people who get work done inside organizations. They are sales reps, customer support specialists, insurance agents, assembly line operators, policemen, nurses, doctors, retail clerks, hotel workers, and more. These people—the ones you support with L&D efforts—face numerous pressures to get the job done each and every day. Typically, they are NOT thinking about what they are learning or need to learn as they work. They are simply trying to do their jobs well.

The **70-20-10** model so often cited as the framework by which people learn at work (70% on-the-job experiences, 20% mentoring/coaching, 10% formal training) is really **50-20-10-5-5**: 50% on-the-job experiences, 20% “hardships,” 10% mentoring and coaching, **5% formal training**, and 5% personal life.¹ This means that for you to support all those learners who get stuff done, you need to think beyond traditional formal tools such as live workshops or eLearning courses. In an increasingly complex, digital world, the toolbox has to expand.

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This report shares data from you, coupled with ideas that we have gleaned from the data to help you expand your toolbox in impactful ways. Our aim is to help you understand what your peers are currently doing in L&D, and also give you insights into what you could be doing. As an industry, we need to focus more on just-in-time solutions that lie outside of formal training and improve the resources we create for just-in-time usage. We also need to improve the quality of the 5%—those formal solutions that are intended to set a foundation for good performance.

Use this report to help you consider the best tools and technologies for helping workers (aka “learners”) get stuff done and get it done well. Identify tools you want to keep using, stop using, start using, or improve how you use them.

Here’s what you’ll find:

• Information about what L&D professionals actually did in 2017, and what they plan to do in 2018.
• Emerging trends for 2018 and beyond.
• Top roadblocks to delivering effective training and how those have changed over time.
• The training topics L&D professionals view as most important in 2018.
• Our insights into the data.
About This Report

This report is a snapshot. Its results are best understood alongside other industry reports, such as those put out by ATD, the eLearning Guild, and the Brandon Hall Group. That being said, the results certainly align with the anecdotal evidence we see as we work with clients. Since we sent the survey to our existing clients and contacts, the breakdown of respondents reflects the industries and company sizes we frequently work with. For example, life science (pharmaceutical, medical device and biotech) and healthcare companies are overrepresented in the results.

The majority of respondents work at Fortune 1000 or larger organizations. A large number of internal trainers at higher education institutions also participated, likely because of their interest in the survey topic. Otherwise, industry representation was broad and balanced.
How We Got the Data

To gather our data, we sent a nine-question survey to BLP clients and other learning professionals who subscribe to our various newsletters. The survey was open from 12/5/2017 – 12/19/2017 and had 119 responses.

When appropriate, we compare the results to our 2017 report, which was based on a survey conducted in January 2017 with 150 responses.

While some survey questions were “select all that apply,” most were open-ended so participants could share their perspectives without being influenced by the answer choices we had created. We took the raw responses and put them into meaningful categories that emerged based on the responses given. If respondents said both “stakeholders” and “lack of time for training” were holding them back, we counted this as one response in each category.
Who Responded?

More than 41% of respondents were at the manager, director, or VP level in their organization, most of whom are in roles directly related to training, talent, or learning. Nearly 53% of respondents were instructional designers or trainers. The remainder of respondents consider themselves consultants or external vendors.
How Often Do You Get Input from Learners as Part of Your Training Design Process?

Just over 41% of respondents say they “sometimes,” “rarely” or “never” involve learners in the design process. We applaud the 59% who “often” or “very often” are involving the learner, but see major opportunity for both groups.

So What’s the Problem?

While a majority of learning professionals report that they do gather learner feedback, our experience shows that the level of feedback gathered is often limited. Traditional audience analysis focuses on audience demographics and prerequisite knowledge; it does not dig deeper to create an empathetic picture of learners. It takes a detailed understanding of learners’ context, environment, pain points, happy moments, and attitudes to create a Learner Experience (LX for short) that leads to uptake and engagement.
Design Thinking

The incorporation of Design Thinking tools in the learning design process is critical to find the sweet spot between learner needs and preferences, business needs and the technology that's most viable.

Design Thinking helps you identify the steps required to do whatever it is you are trying to teach someone to do, the resources required, the support needed, the “happy moments” involved in doing it, the pain points involved in doing it, and the thoughts and feelings that may be happening as someone does it. From that, you can extrapolate the biggest moments of need.
What Knowledge and/or Skills Do Your Target Learners Need to Have to Be Successful in Their Jobs?

Our 2018 data looks quite different in some key areas from 2017 data. Things we noted:

- The double-digit jump in the need for technical skills (an almost 18% increase).
- Significant drops (5% or more) in needs related to safety and compliance, industry and foundational knowledge, and processes and procedures.
Technical skills are high on many L&D professionals’ priority lists, along with a variety of soft skills. The interesting question with both these categories is how well training solves the need. Recall the 70-20-10 framework, which we recast as 50-20-10-5-5 with the 5% as the formal training component. Challenging work assignments, coupled with solid coaching and mentoring, are the means by which most people build skill. Formal training’s role is only going to be 5% of that equation. As we consider a learning ecosystem that enables employees to build technical skills and soft skills, we have to think about training very differently.

**We have to consider:**

- The need for much better, more guided coaching discussions.
- The need for coaching tools that support these discussions.
- The need for reflection tools that help employees self-assess their performance and identify skill gaps as well as ways to close those gaps.
- The need for learning cohort groups whose structure may be less formal than a workshop or an eLearning course but more formal than self-study.
- The need for small, “just-in-time” guidance on things such as having a difficult conversation, setting goals, handling conflict, or facilitating a meeting.
What Challenges Do You Face When You Try to Help These Employees Build the Necessary Knowledge/Skills?

Time and accessibility/technology issues both took jumps from 2017 to 2018 as did work environment issues. This is likely not a surprise to you, as most people report being busier and less able to focus than ever.

**The LMS in the Room**

Challenges also exist with technology and accessibility of training. In our own work, we see that organizations are often constrained by their own technology—or lack of it. LMS solutions often seem like more of a barrier that restricts accessibility of training rather than an enabler. For many employees, logging in and completing an eLearning course is a cumbersome experience. Housing resources within courses almost ensures that they are not easy to find and locate at the moment of need, meaning they won’t get used.

The desire to constantly track what people do keeps
people tied to an LMS solution that serves management but doesn’t serve learners. xAPI is supposed to be a solution for this, but we do not see wide adoption of this technology. Nor do we see clients willing to experiment with it, though success stories do exist in the industry as a whole.

Conversely, those without an LMS often don’t have any coherent online system for employees to easily find answers to their questions or just-in-time resources. Knowledge is fragmented in many different locations and quickly becomes out of date. Collaboration tools like Slack bring their own set of challenges with information constantly coming at users. Solving for one problem (inefficiency of email) brings new problems (constantly being “on” and connected).

There is a huge opportunity for organizations to plan out a **learning ecosystem** and consider how learning can be as simple as a Google search and as readily available as a smartphone app. Here again, a Design Thinking approach can help organizations find the sweet spot between user needs, business needs, and technology capabilities.
What Methods Will Your Organization Use to Deliver Training in 2018?
The Old Favorites

Instructor-led training and traditional eLearning remain the two most consistently used training formats. Usage does not, however, equal effectiveness. Questions exist for how well these modalities actually meet the needs of employees. Often these modalities are chosen because they reflect either what organizations are used to doing, or what is most convenient to the organization, regardless of what would be optimal for the learner. We noticed that while instructor-led training is in fewer organizations’ 2018 plans, virtual ILT (or VILT) is on the rise. This is likely due to the decreased cost and improved efficiency of VILT for many use cases.

A More Mobile Mindset

We are excited to see mobile delivery gain significant traction in the past year. We’ve listed it as an emerging trend since 2008, but enterprise adoption has been slower than many might have expected. The authoring tools available to create phone-first solutions are finally sophisticated enough to produce solid user experiences, with both Lectora and Articulate having strong solutions on the market. This opens up a world where just-in-time solutions can more easily be created.
Lights, Camera, Action

Video usage will jump as the tools to create it continue to become simpler. It’s worth noting that while we see organizations consistently express interest in video, few organizations have good mechanisms for housing videos for easy distribution and access (e.g. the technology and accessibility challenges cited in the previous question). This goes right back to considering the overall learning ecosystem and how organizations are going to make it as easy as using a search engine to access training, examples, how-to’s, and other information “just-in-time.”

Virtual Reality & Augmented Reality

Virtual reality (VR) and augmented reality (AR) have jumped onto the scene with a handful of early adopters committing to usage in 2018. Our advice on this technology is to wait and watch. Right now, they are niche technologies. For VR, the hardware required to use it is a barrier to wide adoption. The environment and setup preclude usage for most applications outside of 360 videos. The jury is out on whether those 360 video experiences viewed via a headset yield better results than video viewed from a laptop or phone.

In spite of the list of technology solutions, we recognize that learning requires reflection—and reflection is often best done socially. Organizations need tactics and tools that get people talking about what they are learning.
What Learning Trend(s) or New Training Delivery Method(s) Are You Most Excited About for 2018?
Get Your Game On

Besides VR/AR, we noted that games and gamification made the biggest jump from 2017 to 2018 in terms of excitement. We see game-based learning as having wide application across many delivery options—mobile, VR/AR, eLearning, VILT, and ILT. Mobile is particularly exciting, as learning professionals are finally able to create user experiences that actually delight users while also delivering a solid instructional design.
What Happened to Microlearning?

Microlearning takes a dive for 2018, likely due to misplaced expectations of what it was actually capable of achieving as a delivery method. Over the past few years, we have seen a lot of misunderstanding around what microlearning is and how it is best used. Microlearning can be a tremendous asset to an overall program or to supporting the reinforcement of a program, but it is not a replacement for a well-designed curriculum that includes many different elements.

Keep an Eye on Virtual Reality

As stated earlier, VR is something to continue to watch and wait on. Technology is going to change rapidly and its best use cases are likely to remain rather niche for now. If you are training people to operate very expensive pieces of equipment or to perform life-saving surgeries or procedures, it may be worth using today. If you are looking for innovative ways to push out education, persuade people, or provide compliance training, you may want to stick with other tools for now.
What Emerging Learning Trends Are You Most Excited About Beyond 2018?

The technologies that most excite us are the ones that offer performance support more than training. Training is that 5%. We’re intrigued by tools that can help with the 50% - the on-the-job learning and working. In that vein, we are intrigued by reinforcement tools that can be delivered via mobile, such as chatbots and voicebots, that let employees ask for help when they need it and performance support tools that continuously become more useful through artificial intelligence (AI).

Augmented Reality

AR will be on the 2018 watch list as a potential performance support tool, particularly with the launch of the iPhone X. Right now, its use cases don’t seem vastly different than what could be achieved with QR codes—and those simply didn’t catch on.
Virtual Reality’s Potential

VR is on our list of “great tools for very specific use cases.” We see VR as potentially outstanding for specific applications where people need immersive experiences to learn a skill. However, VR experiences risk over-emphasizing flashy visuals and under-emphasizing effective instructional design.

Artificial Intelligence is Coming

AI is poised to have a profound impact on our industry in the next decade. Some futurists speculate the vast majority of higher-ed instructors will be AI by 2030. The implication is clear: futurists at least believe AI will alter how people learn new things. And, let’s face it, there is a lot of training that could be done by AI—software training being one major example.
If You Could Improve ONE Thing About Learning & Development and/or Training at Your Organization in 2018, What Would It Be?

- Better training designs & methods
- Bigger emphasis on learning in culture
- Better needs analysis
- Better LMS/tracking system
- More budget/cost effectiveness
- More buy-in from stakeholders
- Misc. tech improvements
- More training time
- More/better training staff
- Better training reinforcement
- Other
What Would You Improve?

Courage is required as we review the results of this question. “Better training and design methods” jumps out to us when we consider the 41% of organizations that often do not get learner feedback when designing training. We again reference Design Thinking as a means of getting to better solution design.

Those seeking a better LMS solution also jumped quite a bit from our 2017 results. For many organizations, their large LMS investment has simply not gotten the desired results. The LMS is not Google, which means a learner cannot simply go to a search bar and type “How do I…” and get an answer. They are great at housing formal training courses and tracking completion of those courses. That’s not what most learners need. Courage, therefore, is required for someone to ask the question, “What if we don’t use an LMS? How else could we design a learning ecosystem? What happens if we don’t track completion of courses, or find new ways to track engagement with learning content?”
Our Takeaways

With all of the opportunity in the 2018 learning landscape, there’s never been a better time to start thinking of learners as people. When we understand their experiences, both inside and outside of their jobs, we can build the empathy necessary to design tools that actually help them perform optimally. And with a variety of new training delivery methods finally reaching a state of relative maturity, trainers now have real opportunities to create learning experiences that meet people where they are and make a lasting impact.

1. **There is an industry-wide desire for better training design methods—as well as a need to cultivate more learner involvement in design.** An exciting opportunity exists to borrow from the software and industrial design industries’ use of Design Thinking. By blending the skills of user experience design and instructional design and involving learners in solution design, we can produce more engaging solutions that truly solve problems.
2. **As many jobs become more reliant on technology, there is a need for deeper technical proficiency across a wide variety of roles.** Any training developed needs to be coupled with strong coaching and performance support, as well as with reflection. Training is the 5% solution; the 70% solution lies in the job experiences themselves coupled with good coaching and peer support.

3. **Lack of available time, both for trainers and learners, is a persistent issue with no easy solution.** Opportunity exists to think beyond training and consider what other solutions can support employees besides a formal training course. When training courses are used, post-training reinforcement needs to stop being a nice-to-have. It is absolutely essential to drive behavior change or skill improvements.

4. **Mobile learning adoption is finally starting to speed up, and great design and development tools are enabling this.** The big jump in mobile being listed as a planned 2018 delivery method, combined with growth in VILT and a slight decline in ILT, shows that while traditional methods remain prevalent, a shift to more modernized training approaches is finally beginning to happen in a meaningful way.
5. **Learning professionals are excited about a broad variety of new training delivery methods in 2018.** There are some alluring new technologies to keep on the horizon (like VR and AR), but mobile learning and even chatbot/voicebot technology are here now and mature enough to be put to use for a variety of training needs.

6. **Games and gamification remain of high interest.** They can be used in an amazingly broad number of ways, making them practical to implement.

7. **There is broad anticipation and excitement for learning technologies on the horizon but not yet ready for broad adoption.** We suggest cautious exploration of VR and AR. We also encourage exploration of chatbots and voicebots, as we mentioned above. Depending on your needs, 2018 may be an ideal time to pilot these emerging approaches.
About Steven Boller

Steven Boller is the Director of Marketing and Product Management at Bottom-Line Performance. He leads BLP’s marketing efforts as well as product development for Knowledge Guru. Steven has authored over 150 educational articles both online for eLearningIndustry, Bottom-Line Performance and Knowledge Guru and in print for the Life Science Trainer and Educator Network’s Focus Magazine. He has delivered webinars for Chief Learning Officer Magazine and Training Magazine Network as well as presented at conferences such as ATD International, ATD TechKnowledge, Training Magazine, the LTEN Annual Conference and DevLearn.

About Sharon Boller

Sharon Boller is CEO and president of Bottom-Line Performance (BLP), a learning solutions firm she founded in 1995. Sharon has grown BLP from a single-woman sole proprietorship to a $4M+ company with 34 team members. Under her direction, BLP created the Knowledge Guru learning game platform, which has received numerous industry awards, including a Brandon Hall ‘Gold’ Award for best innovation in gaming and technology (2014). Sharon is a frequent speaker at industry conferences and co-teaches learning game design workshops with Karl Kapp for ATD and eLearning Guild events. Sharon and Karl’s new book, “Play to Learn: Everything You Need to Know About Designing Effective Learning Games,” was released in Spring 2017 by ATD Press. Sharon earned an MS in Instructional Systems Technology from Indiana University.
About Bottom-Line Performance

Since 1995, **Bottom-Line Performance** has helped organizations create the right learning solution. Whether you have a complex problem to solve, product to launch, or process to implement, our in-house team partners with you every step of the way to design for your desired outcome and develop the right mix of tools: web and mobile apps, eLearning, serious games and gamification, video, and highly interactive instructor-led training to name a few. The end result? Award-winning solutions that solve problems, inspire people to act, and help people learn.

We are also the creators of Knowledge Guru®, a training reinforcement platform that uses adaptive learning, game-based learning, and microlearning to increase knowledge retention and improve performance.

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