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Enterprise E-Learning Trends 2020

A New Era of Learning

Introduction

A Return To L&D's Roots

The learning and development realm is going through a resurgence not seen since the 1980s, and there's a good reason for it. Those heady times over 30 years ago were characterized by economic policies strongly focused on growth and the idea that 'more business is good business'. In the United States, corporate tax cuts bankrolled a rush among employers to hire more workers to keep growth going strong.

Suddenly, the traditional journey up the corporate ladder of being developed internally was overtaken by a surge in external hires. Employers saw this as a risk-free and almost-immediate way to get top talent for the investment they were making. Learning and development programs were now a way to compete – the key to making more money or a more prestigious title lay outside the organization by paying for your own training and then leaving your existing company for a “better” role.

But times are changing or, should we say, times are returning to where they once were. Before the 1980's, learning and development was seen as a core function in retaining employees. Today, as younger generations enter the workforce drowning in student debt, they aren't as willing to invest their own money and time to go outside of the organization to self-train. Today's workforce demands learning opportunities – and organizations are responding.

The last 30 years have also signaled a seismic shift in the technology available for all aspects of the business, and learning is no exception. In fact, the pace at which learning technology has evolved is a direct result of the many variables that demanded that evolution in the first place to ensure L&D remained relevant, engaging, and effective. The lines are blurring between our corporate and private lives – the tools we use to communicate and learn must mirror that evolution.

The reality is that the learning management system (LMS) is no longer a strong enough tool to keep up with the realities in which people now learn. Organizations must expand their e-learning offerings beyond the traditional methods and approaches, and take a broader look at how to best engage learners and the technology available to help do that. The LMS must now become a holistic Learning Platform that supports better learning management, better experiences and, ultimately, better outcomes.

The year 2020 signals the start of a new decade and brings with it a new era for enterprise learning. Read on to gather valuable (and actionable) e-learning insights, including:

- An explanation of emerging technology trends in the L&D space, such as content curation, virtual coaches, and the continued advancement of intelligent Learning Platforms.
- An outlook at the potential further developments to come in 2020 and beyond.
- The critical role professionals leading different learning activities must play to ensure ongoing success.

Table of Contents

4 Enterprise E-learning Market: State of the Industry

8 Learning Content

9 Smarter Content Curation

11 User-Generated Content

14 Learning Experience

15 The Next Mobile Learning Experience

17 The Chatbot Transforms into the Personal Trainer

19 Personalization Goes Mainstream

23 Greater Maturity of AR And VR

25 Learning Automation

26 Artificial Intelligence Keeps Getting Better

28 Connecting Skills with Organizational Strategy

31 Augmented Learning Delivery

33 Learning Impact

34 Learning Effectiveness

37 The Evolution of People Analytics

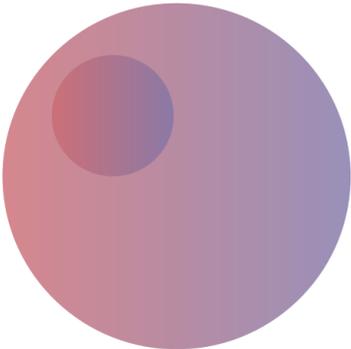
39 Conclusion

The Enterprise E-Learning Market: State of the Industry

Learning and development is in vogue and so too are the tools to help support it with increased efficiency and scalability. At its core, the enterprise e-learning sector is witnessing high adoption rates due to the increased demand for effective learning programs for employees, partners, customers, members, and other audiences.

The wider corporate e-learning sector is anticipated to grow at a CAGR of around 8% from 2019 to 2025.

Source: Global Market Insights

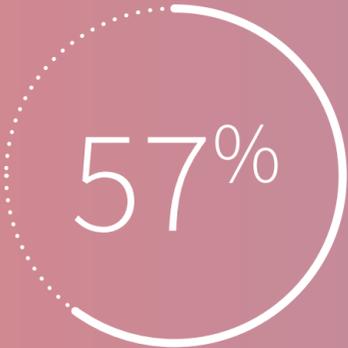


Top 5 Business Priorities Today

- 1 - Improving Customer Experience
- 2 - Gaining Market Share
- 3 - Developing New Products or Services
- 4 - Retaining Top Talent
- 5 - Improving Brand Recognition

Today's business leaders place 'retaining top talent' as one of their top priorities, marking a significant move away from the external hiring spree of the past 30 years. It's no surprise then that investment in learning and development is growing in response to this.

Source: Brandon Hall Group HCM Outlook 2019



57% of organizations are looking to make a large or moderate investment in L&D in the next year.



1 in 4 organizations are looking to make a large investment in aligning learning strategy & business goals.

Source for both: Brandon Hall Group HCM Outlook 2019

The Biggest Motivator: Unlocking the Value in the Existing Workforce

The average payback period for an external hire
= **2.2 years**

The average tenure of a top candidate
= **1.2 years**

Source: Aberdeen Group

External hires are leaving before organizations have realized a return on their investment and this recurring trend has become the catalyst for a greater focus on reskilling and upskilling efforts. As enterprise needs change at a rapid pace and the talent market becomes even tighter, business leaders have turned their sights inward and are asking, “how can we develop our internal talent for our needs today and tomorrow?”

The Most Significant Workforce & Talent Issues for the C-suite

- 1 - Transitioning to the future of work
- 2 - The need to redesign work
- 3 - The need to reskill the workforce

Source: [Deloitte 2019 Human Capital Trends Report](#)

If we look more specifically at the workforce and talent priorities for the c-suite, there is a clear focus on adapting the current crop of talent, rather than looking to replace where possible. Of course, this leads us to the ‘how’ of actually facilitating this learning endeavor, and many will be quick to point to the already-widespread use of the learning management system (LMS). But while the LMS is a popular tool, it is still failing to achieve the desired results.

Best-In-Class Companies Are 3.4x More Likely to Use a Traditional LMS



Source: [Aberdeen Group](#)

Is This The End of The Traditional LMS?

As we will explore throughout this report, the traditional LMS doesn't cut it in today's business environment. Organizations now demand a continuous culture of learning and the tools to not only support that but to become a key differentiator in how talent is on-boarded, developed, and optimized within the company. New skills need to be developed, new learner expectations must be delivered upon, and new objectives must closely link learning with business outcomes. Organizations need to be adapting and maneuvering, but they need to enable their workforce to be capable of moving with them, and that's where a true learning and development environment comes in.



Main Objectives of the Learning Function

- Be sure that learners get and use the right learning content.
- Make a difference by enabling people to learn and get better at what they do.
- Reduce labor-intensive, training-related tasks.
- Make learning a company's competitive advantage.

Today's Learner Expectations

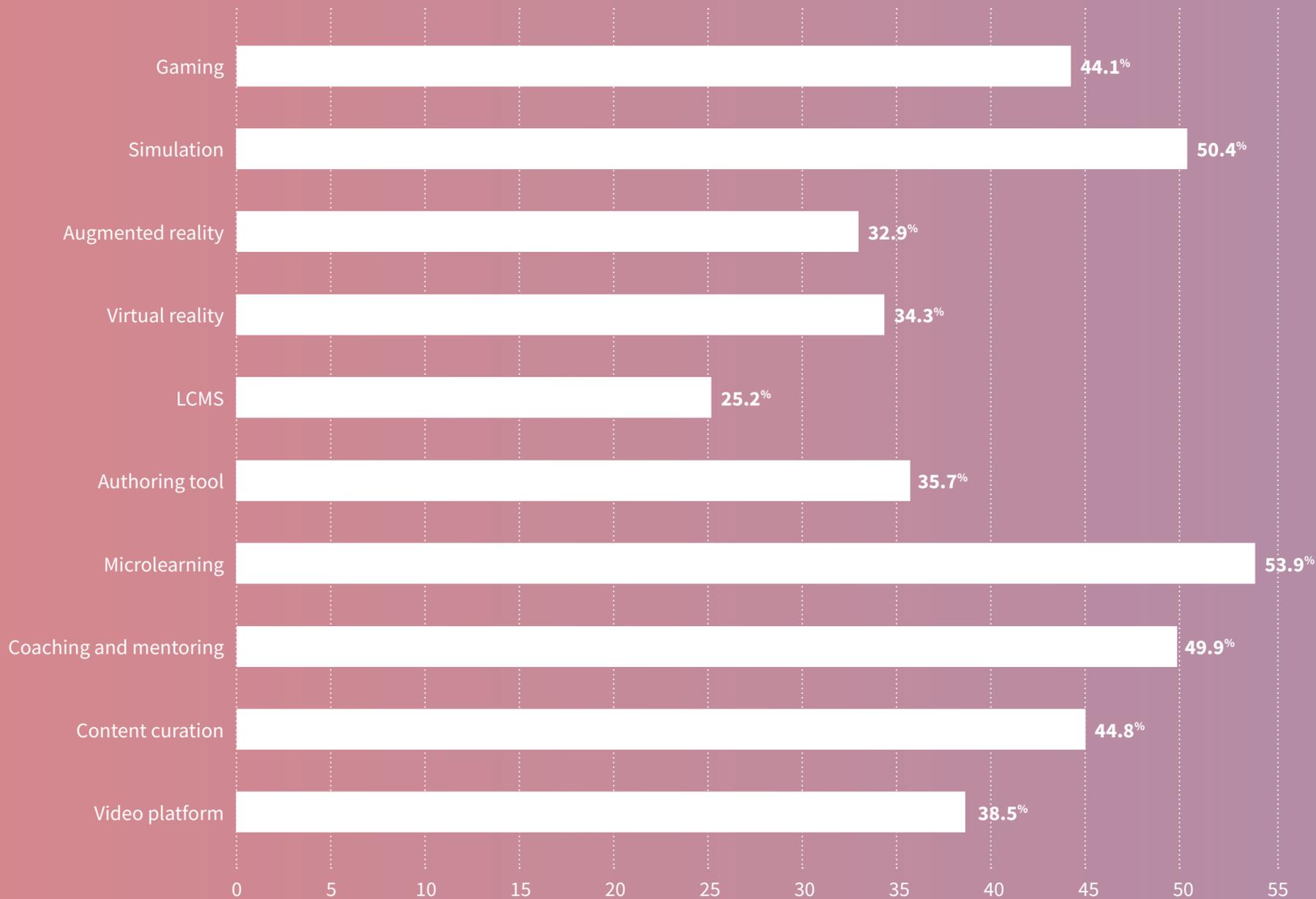
- Learning as part of the working experience.
- Personalized and unique learning experiences.
- Greater control: the content they want, when they need it.
- Digestible, easy to find, informal, social, mobile.

Organizations Want to Develop New Skills

- Emotional Intelligence
- Critical Thinking
- Innovation
- Continuous Learning
- Analytics
- Collaboration
- Coaching Mindset
- Adaptability
- Learning Agility
- Valuing inclusion

Source: Brandon Hall Group HCM Outlook 2019

“Are you Looking to add any of the following software in addition to your LMS?”



Source: Brandon Hall Group - Learning Management Tech 2018

Elevating your learning environment requires a mix of the right people and processes that lay the foundations for the right technology to make it happen and then scale. Driving better learning outcomes and ultimately equipping your whole organization for the future is no easy feat but the market is adapting to help streamline that process.

This report outlines the major trends set to impact e-learning in 2020 and beyond. These trends have been categorized into four major groups that tie back to the key areas of today's learning function, both from a learner and management perspective:

Learning Content

Learning Experience

Learning Automation

Learning Impact

Enterprise E-Learning Trends 2020

Learning Content

TREND Smarter Content Curation

WHAT'S DRIVING THIS?

When it comes to learning content, there are three key pain points in getting the right (and most relevant) material in front of learners: there's too much content out there, the quality can't always be verified, and, "is it up-to-date?"

Let's consider compliance training, for example. A learner might go to your Learning Platform and take a course on financial regulations. The course was likely well-researched and informative, but it's now out of date. In fact, it was likely out of date the moment it was made.

If learners are searching for insights on recent regulatory changes, that course won't help them. They need to know how to discover relevant content quickly and this is increasingly vital for today's knowledge worker. But the Learning Platform isn't always their first port of call.

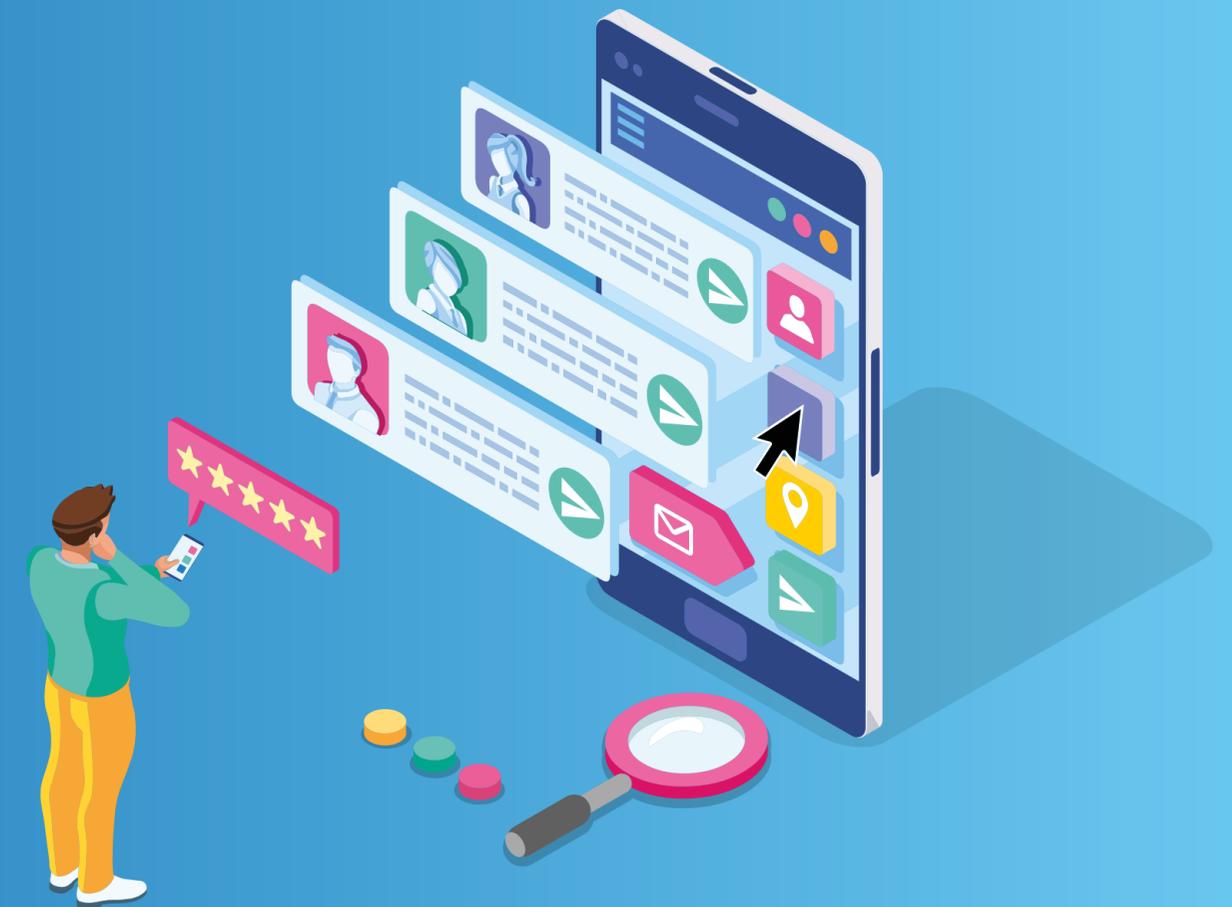
In fact, almost 40% of employees go to Google before asking a co-worker or using their employer's learning technology. This doesn't mean that the content isn't on the Learning Platform, but merely that the platform hasn't been curated to most effectively and efficiently meet the learner's needs.

Content curation is being used extensively to address this pain area, especially as it relates to content within a Learning Platform. But innovations in the realm of curation have made it possible to automate the time-consuming selection and filtering process to present only the best and most relevant content to learners.

"OK Google, How Do I Do My Job?"

40%

Almost 40% of employees go to Google before asking a coworker... including 1 in 3 Millennials



Source: Docebo's 'Fake it 'til you make it' Survey

SOLUTIONS IN THE MARKET

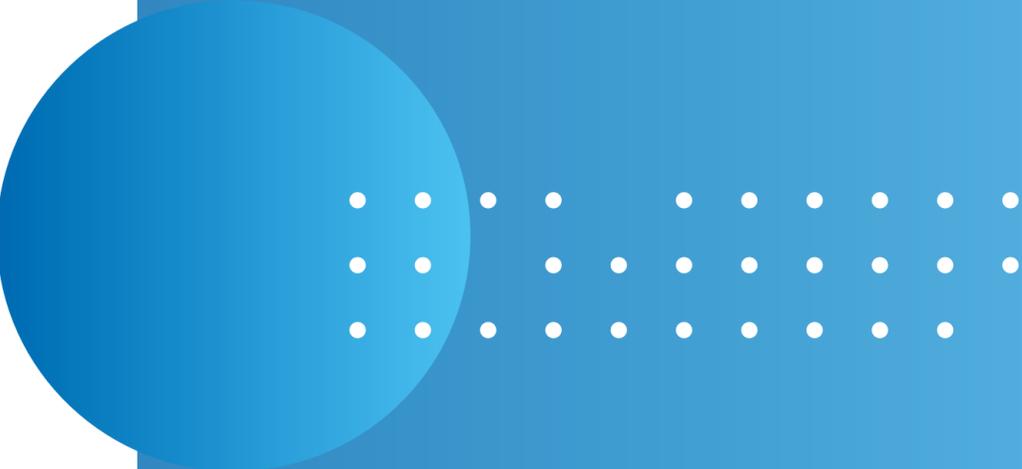
Solutions are now being introduced or integrated by learning technology providers to dynamically aggregate content from millions of sources around the web, for your needs. You simply choose the topics, keywords, and sites you want it to scour and it produces a live stream of all the latest and most relevant content.

You can then plug this stream into your Learning Platform to make it easier for your learners to engage with.

WHAT THE FUTURE HOLDS

A learner's interactions with the curated content are analyzed by your Learning Platform, which recognizes content deemed most engaging. The platform understands these preferences and uses this information to further refine results, gathering additional insight to automate a continuous approach to curation. The result is to not only make the entire process more engaging, but also autonomous by empowering learners to be more proactive in their learning journey, without admin intervention.

The next step would be to make the platform able to understand a learner's skills gaps, based on their courses and performance, and then tailor the curated content to present information that will help bridge those gaps.



“Organizations have looked at content curation as a massive tagging project. It’s up to learning technology providers to help organizations through this. None of these other learning tools work if you don’t have your content, either curated or mapped, or a taxonomy that makes sense so it can point you in the right direction, whether it’s for subject areas, or for learning audiences.”

David Wentworth, Principal Analyst, Brandon Hall Group



TREND User-Generated Content

WHAT'S DRIVING THIS?

User-generated content (UGC) makes up the vast proportion of digital content: Facebook posts, YouTube videos, Instagram photos - it's what we love! Not only do people want to engage and contribute, but from the perspective of someone who receives that content, they are more effectively reached and engaged because it is more authentic and makes audiences feel seen and appreciated. It's what the world's brands are now turning to, compared to traditional top-down marketing approaches.

And this can all be applied to the learning space.

UGC is a natural evolution from social learning - the 20% of the 70:20:10 model. While, in the past, employees or customers might reach out to their peers with questions or share knowledge in person, UGC makes this experience available anytime and anywhere. Learning technology has mirrored the trends of our consumer technology and evolved from simply delivering content (think: TV channels) to now enabling learners to create their own content and share it with an audience (think: YouTube, Instagram) in a way that spreads its value more effectively across the organization.

Common forms of UGC in learning



Source: [Social Learning's Next Step: eLearning Industry & Docebo Webinar](#)

Note: Respondents could select more than one option

Learners that value the ability to collaborate with instructors and/or other learners via forums, groups, or Q&A sessions while taking a course.



Source: [LinkedIn Learning](#)

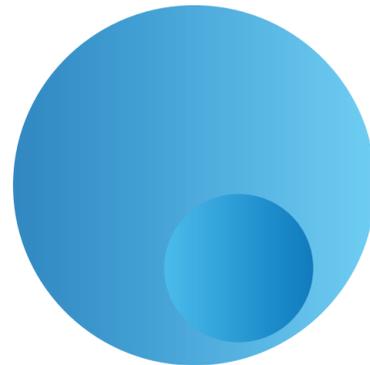
As we see above, UGC can take many forms and is valued by learners across all generations, but the common thread is that this content comes directly from your learners.

In an enterprise learning context, seeing assets created by your peers about their experiences on the job, and their willingness to share them, builds trust, connects people, and amplifies relevancy, rather than having a sole dependency on one-size-fits-all content.

Most training is considered to be too generic, too basic, and too boring, according to Dr Nanette Miner, founder of the Training Doctor.

Too much learning content relies on absorption instead of interaction with someone who has been in your role and learning what they believe to be most critical.

The learning process goes both ways, with learners providing feedback to content creators and spurring discussion to improve knowledge sharing across the organization.



“How effectively is your organization able to identify and track metrics, including participation and business impact for the following learning types”

FORMAL LEARNING



Effective

INFORMAL LEARNING



Effective



Not at all effective

Source: Brandon Hall Group - Learning Measurement 2019

How do you measure informal learning?

- Who is participating most?
- Who do people go to most often for information?
- What kind of content is getting shared the most?
- What are people searching for?
- Are people applying those insights on the job?

SOLUTIONS IN THE MARKET

Social learning tools are not new but their use in enterprise learning is growing. Whether tied to the core functionality of an LMS or available as an add-on within a Learning Platform, common features include; discussion boards and ‘ask the expert access’, the ability to create, edit, and share screen and webcam recordings as well as presentations or text documents, and the ability for experts to validate content before it is shared, to ensure accuracy.

As social learning continues to make up a greater part of learning programs, a critical next step is ensuring the knowledge generated by your learners is used in the best way possible. Learning technology providers are now leveraging artificial intelligence to elevate user-generated content and support personalized learning across the organization. By understanding learner preferences through analyzing behavior, the Learning Platform serves up recommendations of informal learning material (UGC) to consume. This action helps to create an engaging and individualized learning experience that is more likely to be retained and applied on the job. At a wider look, this also scales the effectiveness of one person’s content contribution.

“An organization has to be willing to let go, to a certain extent. You have to have some faith that you’ve hired some smart people and people want to learn from each other. So we have to make that happen. As long as there are controls and permissions to ensure the right information is being shared, then that will address the hesitance or reservations in leveraging user-generated content.”

David Wentworth, Principal Analyst, Brandon Hall Group

UGC In Action

A major telco found that employees were open to the idea of creating content to help others, but they just didn’t know where to start.

The learning and development team took employees through a 45-minute e-learning session outlining what to address with user-generated content and different formats to deliver it in, from presentations and short videos to audio recordings.

The main point was letting employees know that the content just needed to be “good enough,” it didn’t need to be an amazing, high-quality piece of training material.

“Good enough” is when the content helps employees achieve their targets.

Within 6 months:

- **The number of user-generated content assets jumped by 60+%**
- **Monthly active users increased by 171%**
- **Employee satisfaction with learning content went up 10%**

Enterprise E-Learning Trends 2020

Learning Experience

TREND The Next Mobile Learning Experience

WHAT'S DRIVING THIS?

In last year's trends report, we outlined mobile learning's growth and where organizations can best apply it. Since then, we have seen the understanding of mobile's usefulness grow and organizations are becoming more selective in how they leverage it for learning delivery.

There is no silver bullet with mobile because it can be used so differently. This is where the importance of delivering specific experiences to select audiences lies.

Why Enhanced Mobile Learning Delivery Is So Important

A successful mobile learning experience should:

- Enable learners to access knowledge at the point of need
- Accelerate knowledge exchange
- Facilitate uninterrupted learning with offline capabilities
- Provide a seamless learning experience aligned to your brand

This last bullet point is where limitations lie with many current mobile learning offerings.

Mobile apps from learning technology vendors will offer customization capabilities, such as changing the images, logo, and colors to match a company's branding. But we've learned that while this is an important piece of the mobile experience, it's only half of the equation.

Nearly 70% of organizations now offer mobile learning in some form.



Of young corporates own a smartphone or tablet.



Access resources from their smartphones to do their job.



Of employees prefer accessing learning modules on the go.

Source: [Towards Maturity](#)

“Companies are realizing they need to have a somewhat specific strategy around mobile. It's not just, ‘Hey, we want everything to be mobile first and we'll figure it out.’ Because this is a wasted effort.

It's really about making sure they have access to information, just like they would in any other environment outside of work. We tend to see mobile as this separate entity, but it's just part of the overall experience.”

David Wentworth, Principal Analyst, Brandon Hall Group

Companies invest upwards of \$30,000 in branding and image

Source: *Forbes*

Brand alignment and consistency is a big factor in today's business environment where there is so much noise. When we look at specific learning use cases, the external training function is one where the brand experience should be as seamless as possible. These learners are outside the immediate organization but might be required to represent your brand as a partner or reseller.

In the case of mobile apps from learning technology providers, your external training learners have to first search for the provider's name or app in the app store, download an app from a company that they may not have heard of, and insert their credentials to start learning on the go. This disconnect can mean that your company's image loses strength.

This is ultimately driving a shift towards branded mobile learning apps that give companies greater freedom in their configurability and a consistent brand experience.

SOLUTIONS IN THE MARKET

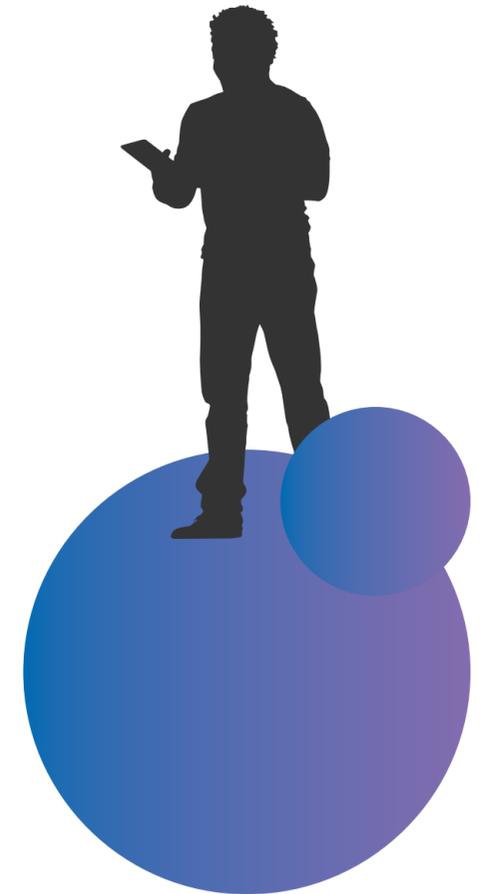
Of course, some organizations have tried to combat this problem by building their own app for their learning needs, but this simply isn't a viable solution for most. It requires a huge investment (upwards of \$100K) and technical information that most L&D departments simply don't have, leading to a very expensive, chaotic, and time-consuming process.

In 2019, the Mobile App Publisher offering was developed by Docebo to enable companies to leverage our learning technology-specific expertise to build and brand their own learning app and publish it in the Apple App Store and Google Play store.

This on-demand app builder service provides the app structure, implementation support, and branding configurability to produce a continuous learning experience. Companies also get access to the usage metrics of the app, which they wouldn't get by simply using a learning vendor's app.

Trackable metrics with your own app include:

- Downloads and installs
- The number of active users
- Average session length
- Retention rate, which measures how many users return to your app after using your app at another time.



TREND The Chatbot Transforms Into The Personal Trainer

In recent years, society has moved away from a desire for products towards a greater appetite for experiences. The “Experience Economy” has coincided with the rise in social media. Unsurprisingly, leading the charge in this new economy is the largest generation in the workforce: Millennials, a group forcing entire industries to adapt to their changing expectations of work and life – and enterprise learning is no exception.

Learning products were typically passive catalogs of one-off training materials, designed purely to be consumed to acquire more knowledge before moving on. This was an overly formalized process in which impact didn’t matter as long as the activity was completed. That approach won’t work nowadays because of the growing emphasis on experience and the many ways on-the-job, in-the-flow-of-work learning experiences influence knowledge retention, professional development, and performance.

Learning in the flow of work was addressed in last year’s report but one major development in this space that will become even more prevalent in 2020 is the use of learning chatbots, or more specifically, digital personal trainers.

Chatbot vs Personal Trainer

CHATBOT

Typically reactive

Customer-oriented

An assistant: makes customers happy

Transaction-driven: short game

PERSONAL TRAINER

Mostly proactive

Learner-oriented

A trainer: makes learners improve

Goal-driven: long game

“The next level of chatbots will be infused with AI capabilities that can make assumptions about your intentions. It knows that what you’re asking relates to X,Y, and Z. That concept of relating some information to other information, I think, will become much more prevalent. People want to save time and organizations that are deploying bots want them to do more than just answer predictable questions.”

Steve Goldberg, VP and Research Director, HCM at Ventana Research

It's easy to see where these “virtual coaches” provide value relative to performance support by having an on-call, digitized expert that you can turn to for immediate answers. But what if this conversation wasn't always instigated by the learner?

Chatbots are traditionally mostly reactive and simply provide answers to queries. The exciting potential for L&D is when artificial intelligence-powered tools become more of a coach that engages without prompts from the learner, while becoming the go-to source for answers and directions to the most useful and relevant content to support the query.

This digital trainer would recommend content to learners based on their progress and even send a nudge when new content is available that's relevant to the needs, or skills they've identified that they would like to develop. This facilitates a personalized and 1-to-1 learning experience that guides their journey while reducing the need for admin intervention.

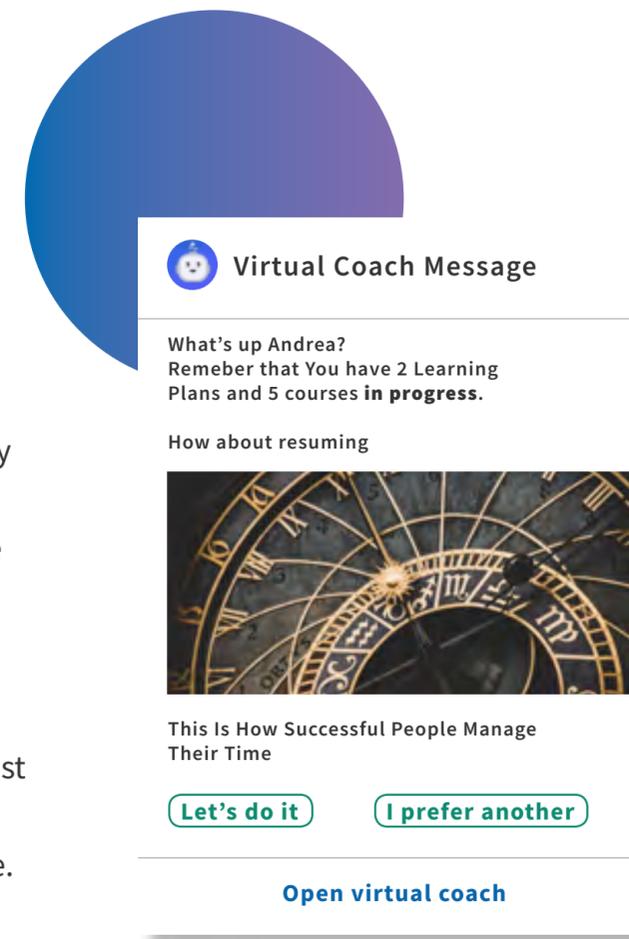
The end goal of this smart personal trainer is to ultimately help learners improve over time through continuous, interactive learning. This starts with a natural conversation, directly within the Learning Platform, at the point of need.



SOLUTIONS IN THE MARKET

There are a number of chatbot-style tools available in the market right now that are being incorporated within Learning Platforms. The personal trainer-style experience is just beginning to be released by vendors with improvements in the experience expected as technology improves. Early 2020 will see one major “personal trainer” chatbot in the market that will act as a proactive coach for each and every single user in a Learning Platform.

Learners will be able to ask for recommended content, monitor learning progress, ask questions related to content in their platform, receive notifications about content that may interest them, or even just have a conversation. And as learners interact with the trainer, it will learn from this feedback to evolve and improve its coaching over time.



“The big development with a chatbot will be - can it see into the various systems like, ‘Oh, this is a question about learning, I can go dig into learning to find relevant content.’ Or ‘This is a question about your performance goals, let me go pull from there.’ I think that’s going to be the key because people aren’t going to want to have seven different conversations with chatbots.”

David Wentworth, Principal Analyst, Brandon Hall Group

TREND Personalization Goes Mainstream

The demand for personalized learning is stronger than ever. Different learners have different preferences for both how and what they want to learn, and this must be reflected in their learning opportunities. Let's look at some of the preferences and sentiments across generations:

43%

Of Gen Z prefer a fully self-directed and independent approach to learning.

87%

Of Millennials, now the largest generation in the workforce, say that professional development is very important to them in a job, but most of them feel their learning experience is boring and not relevant.



1 in 3 Baby Boomers do not receive any tech training from their employer, despite preferring this over soft skills training.

40%

Of Millennials would prefer to learn how to better present and unlock creative thinking.

Source: [Docebo 2019 Tech Skills Gap Survey](#)

With employee engagement rates continuing to pose a threat to productivity, personalization is key to ensuring effective learning and increased performance.

Learning technology is critical to the effective execution of personalized learning programs. The LMS has traditionally been more of delivery and management system, but that is already changing as these offerings evolve into Learning Platforms that encompass more capabilities than a simple LMS. One of the key ways a Learning Platform addresses learning personalization is in better understanding and taking action on learner behavior.

This includes incorporating artificial intelligence algorithms to orchestrate greater interaction with learners to deliver personalized resources and learning activities. A Learning Platform can help you gather data specific to individual learners to help you identify skills gaps and provide tailored learning programs.



74%

Of talent developers say they plan to make changes to their L&D program to accommodate Gen Z workers.

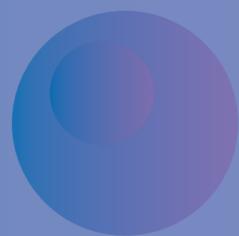
Source: [LinkedIn Learning](#)

33%

Of learning professionals plan to focus on adaptive learning in the next year.

Source: [2019 HR/L&D Trend Survey - The Ken Blanchard Companies](#)

The Personal Learning Experience: Always Adapting



SOLUTIONS IN THE MARKET

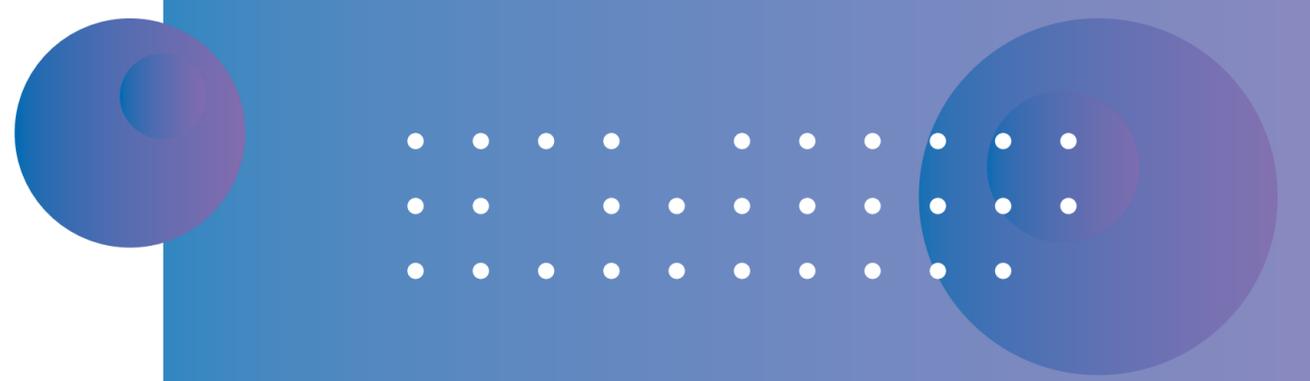
Greater personalization capabilities within e-learning have become more prevalent in the past year and are taking many forms.

Content suggestions are, of course, one of the areas that learning professionals have been keeping a keen eye on, and this functionality is already available and showing great potential.

Within Docebo's social learning module, Coach & Share, the "Next Content Suggestions" feature showcases content that peers have contributed and that are relevant to what a learner is currently engaging with and their overall role function.

It's not about content that they may find interesting or courses that are similar to ones they've already taken. It's about driving and elevating the workforce through AI-powered social learning. This is all about facilitating personalized suggestions without having learners waste time searching for content that is most relevant to their success.

On the administration and management side, AI-powered Learning Platforms are providing personalized enrollment suggestions to streamline this task. The platform automatically produces a list of learners for a particular course during the enrollment process (based on their role, course, and content), reducing the time needed to search for users who will benefit most from a specific course.

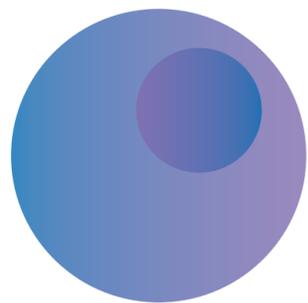


"We're starting to see a growing need for a stronger corporate commitment to the value of learning. Modernizing the company's learning environment to meet demand for personalized employee career paths is still a bit of a tough sell, however, because it asks for a long-term investment in resources for talent that is beyond the scope of most finance organizations – the payoff down the line is worth it though."

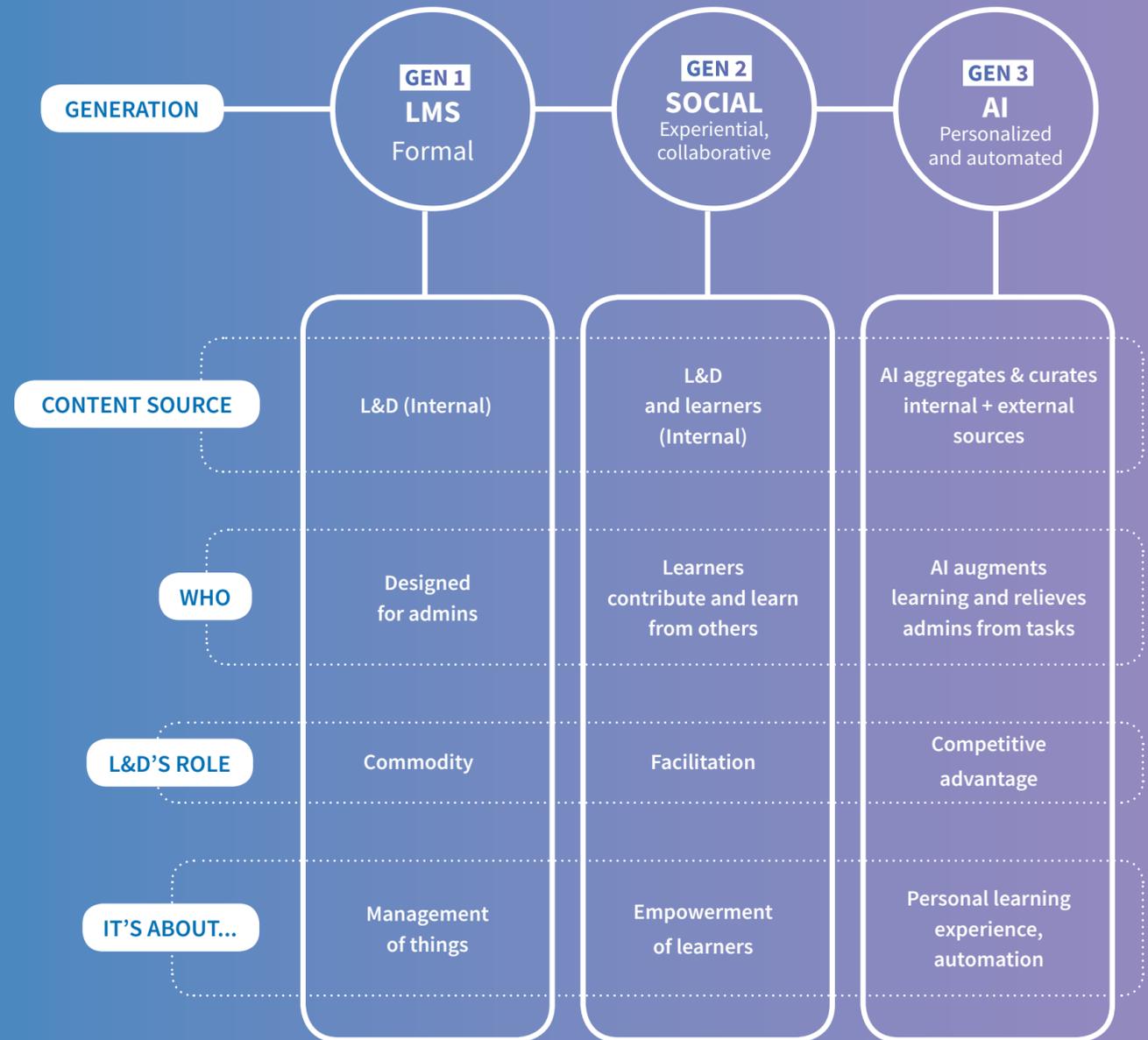
Zachary Chertok, Analyst at Aberdeen Group

WHAT THE FUTURE HOLDS

As these personalization capabilities mature, the next step is for learning paths to uniquely adapt based on learner progress. This means different students who might have started with the same course because of their role may be assigned different materials by the platform to support a more efficient path to completion and application. As their function within the organization develops, so too does their learning experience to support continuous progress.



We've Entered the Third Generation of L&D



TREND Greater Maturity of AR and VR

WHAT'S DRIVING THIS?

Any look into the trends impacting e-learning would be remiss if we didn't touch on the growing area of augmented reality and virtual reality. But first, let's explore what these technologies mean.

VIRTUAL REALITY

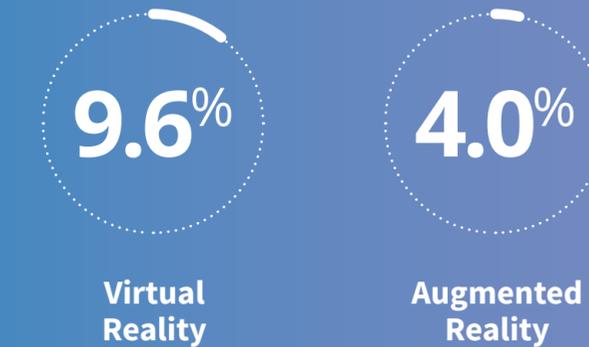
Creates experiences that totally block out vision of the real world and replace it with a virtual one using 360-degree video, photospheres, or completely computer-rendered environments. Usually requires a headset.

AUGMENTED REALITY

Provides users with billboard-like information about a task, either on an alternate screen (phone) or through projecting images onto lenses in front of the eyes.

Source: [Accenture](#)

Organizations using technology to support:



Source: [Brandon Hall Group HCM Outlook 2019](#)

“VR views the physical world as a distraction, whereas AR views the physical world as an asset.”

Dan White, CEO, Filament Games

“I do think that AR will eventually exceed the take up and the receptivity of total virtual reality because of cost factors. And because the more connected you are to some aspects of reality, the more representative the learning experience will be when there are elements of the real world and augmentation.”

Steve Goldeberg, VP and Research Director, HCM at Ventana Research



SOLUTIONS IN THE MARKET

The proliferation of these technologies has spurred early experimentation into their use in a learning context but, so far, these should still be viewed as delivery mechanisms for specific use cases.

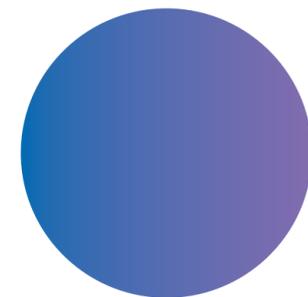
In the case of virtual reality, this becomes a unique training tool for putting learners in situations that can't always be easily recreated.

Verizon has been using the technology to train its retail workers in handling armed robberies. By putting employees in this situation, while ensuring they are still in a safe environment, the company helps workers learn proper ways to prioritize safety and minimize physical harm if this scenario happens.

The adoption of augmented reality in learning has so far lagged behind virtual reality, but the gap is set to narrow as more organizations leverage its greater accessibility. Where virtual reality requires a headset, which can be costly, AR is predominantly being delivered on something we all have in our pockets – our phones.

By using a phone's camera and an app, organizations have already started to modernize learning. In the onboarding process, physical signage has been replaced by digital experiences that are showcased through a phone. Performance support is also an area seeing uptake with learners able to overlay something like a 3D model over a work in progress to understand what still needs to be done.

As technology driving VR and AR continues to mature, more and more organizations will explore how it can be applied to their learning use cases in a way that will provide the greatest value.



Enterprise E-Learning Trends 2020

Learning Automation

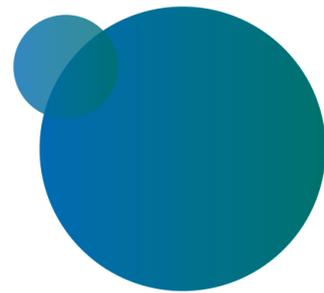
TREND Artificial Intelligence Keeps Getting Better

WHAT'S DRIVING THIS?

In the past year, we've seen artificial intelligence (AI) begin to gain more traction within learning as L&D pros develop a deeper understanding and providers refine their offerings.

This will have a significant impact, particularly on how learning teams will be able to scale their activities, while leveraging personalization.

With the introduction of AI in the enterprise learning sphere, organizations are seeing massive changes in productivity as menial tasks are automated. In fact, companies are starting to incorporate AI into their business strategies as they see the potential it has to increase growth.



Of organizations state that AI is essential for their organization's strategy to succeed.



Believe that AI will drive the organization's growth.

Source: Infosys



Of enterprises have implemented artificial intelligence in some form in the past year. That's up 270% in 4 years.

Source: Gartner

SOLUTIONS IN THE MARKET

Selected learning technology providers, including Docebo, have seen the potential for AI in learning programs and have incorporated them into their core systems. The exciting prospect is that AI engines, by their very nature, improve the more they are used. The more that a learner engages with the Learning Platform, the more AI can source and present course material personalized to a learner's preferred topics, course format, and skill level.

“HR orgs are strategizing for personalized, unstructured L&D – they see the correlation between employee-specific career journeys and increased engagement and retention. To get the strategy right takes an investment in next-gen adaptive analytics that break traditional expectations for stage-based learning to follow employee behavioral patterns. Behaviorally-driven programing is where the future of L&D is and this is indicative of a bigger future in adaptive and behavioral analytics.”

Zachary Chertok, Analyst at Aberdeen Group

Like A Fine Wine: AI Gets Better Over Time

The more you and your learners use and guide the AI-powered Learning Platform, the better the results it produces



TREND Connecting Skills With Organizational Strategy

WHAT'S DRIVING THIS?

Business leaders are moving away from relying on external hires to drive growth and, instead, casting their eye internally to develop their existing workforce.

With the high cost of rehiring, organizations are realizing the need to analyze employee skills, uncover skills gaps, and provide education aimed at bridging them. For 81% of learning professionals, upskilling and reskilling the workforce is becoming a necessity.

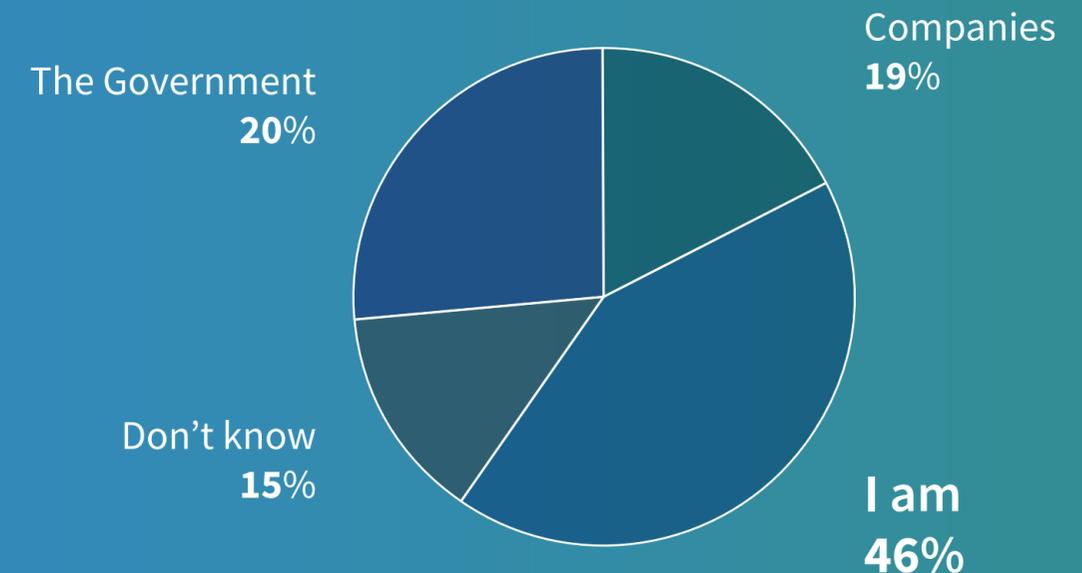
While learning professionals can often be heavily reliant on manager observations to identify worker skills, a wide variety of research says that humans are inherently biased.

As a result of this, learning departments are turning to AI-powered analysis to accurately identify where their employees need upskilling, and discover opportunities to reskill them for other roles.

When asked for the reasons that prevented their workers from preparing for the future, business leaders' most frequently cited workers' fear of change. However, workers most commonly believed that the responsibility for preparing for the future fell squarely on them.

The Disconnect Between Worker and Leader Perceptions to Upskilling and Reskilling

Workers' perceptions about who is responsible for preparing them for the future



Source: Harvard Business School

Business leaders' perceptions about what prevents employees from preparing themselves for the future of work

- 1 - They are afraid to make any significant change - 29%**
- 2 - They cannot afford the immediate costs - 24%**
- 3 - They believe it is not important for them today - 24%**

Source: Harvard Business School

SOLUTIONS IN THE MARKET

The power of AI is only realized the more there is interaction with the platform and it begins to learn what works and what doesn't for both learners and admins.

In the case of skills identification and development, this task has traditionally fallen on learning professionals and it failed to give the learner a say in what skills they wanted to grow. This top-down assignment of courses resulted in a critical exclusion of the learner's input.

However, Learning Platforms are now enabling learners to identify which skills they want to grow within their learning environment and then have the platform serve up related content. As learners engage (or flag suggestions as irrelevant) the platform builds an understanding of what is being consumed and further refines what it serves up, while also curating relevant external content.

The average cost of employee turnover:
33% of the position's salary

That's approximately
\$20,000 for a job paying \$60,000 a year

Source: Work Institute

Cost to reskill someone for another job:
under \$10,000

Source: Docebo & Lighthouse Research and Advisory

Top 3 Barriers In Developing And Managing Competencies And Skills

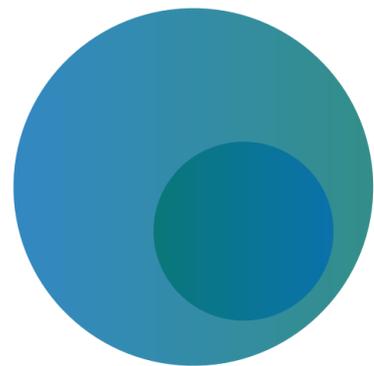
- 1 - Managers are not offering enough feedback and coaching**
- 2 - Executives are not aligned on how to develop competencies and skills across the organization**
- 3 - No long-term plan for identifying the talent and associated skills for the future**

Source: Brandon Hall Group - Competency and Skills Development 2019



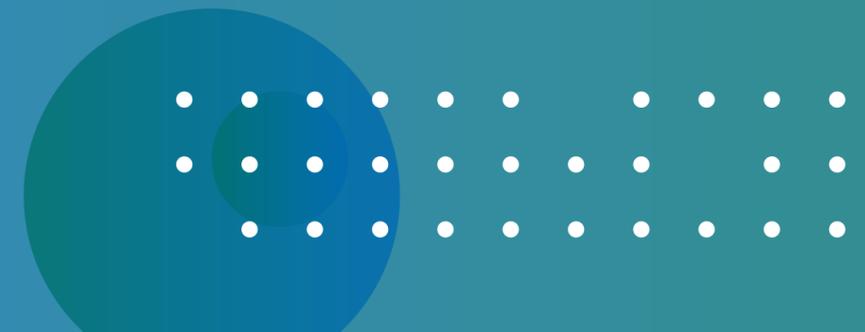
On the admin side, this begins to take away the burden of finding content relevant for each individual learner. The learner's input also helps to guide learning managers to create a more thorough view of what their learners want to develop and use this to further support what is being delivered in the platform. From an organizational standpoint, this starts to address the important role upskilling and reskilling will play as roles and business structures change.

Going forward, as organizations put further importance on linking personal skills development to broader business performance, we expect this to, ultimately, facilitate broader, organization-wide optimization strategies.



“We are at a point where individualized and analytically-driven skills development can facilitate a broader, organization-wide optimization strategy for new and existing talent – now firms need to feed this into redeployment options and break down functional silos to open the whole organization to L&D-fueled employee mobility potential. Optimization expands employee career horizons and lets management determine where an employee's interests best align with business goals to drive the most value for the wider organization.”

Zachary Chertok, Analyst at Aberdeen Group



TREND Augmented Learning Delivery

WHAT'S DRIVING THIS?

As more learning objects are created and more learners are added to programs, employees and managers have less time than ever to search through a catalog of courses to find what they need. In our look at the trend towards smarter content curation, we outlined how AI plays a vital role in linking the appropriate content with the learner.

But where AI will also assist in delivery further down the line will be in finding the most relevant content snippet inside a longer piece.

In addition, learning departments are realizing that required learning and voluntary learning should and need to be delivered differently. The motivation behind engaging in voluntary learning must be treated as a separate strategy.

As always, engagement rates must also be monitored and improved upon, so the learning platform must be able to run accurate evaluation if an organization is to make learning its competitive advantage.



“Employees and managers have less time than they’ve ever had to go search a catalog of content. So it’s not just finding the content, but it’s finding the most relevant content or content snippet inside longer content. What are the 3-5 minutes that are most relevant inside a 1-hour video? AI plays a role here, for sure, to be able to pinpoint those learning content snippets while understanding what’s behind a learner’s request, what problem are they trying to solve? What’s the context of their job?”

Steve Goldberg, VP and Research Director, HCM at Ventana Research



SOLUTIONS IN THE MARKET

Learning Platforms are focusing more and more on delivering learning in a smarter way, augmenting the role of learning professionals rather than replacing them.

A powerful solution within Docebo is auto-tagging for course content, which streamlines content categorization and consistency. This makes it easier for learners to find the content that they need, and takes the responsibility of accurately tagging course materials away from learning professionals.



WHAT THE FUTURE HOLDS

With AI-powered auto-tagging, this will evolve to include multiple languages, so that learners can find any content in their preferred language faster than ever before. By letting the platform's AI listen to the context of the content and tagging it accordingly, learning admins and content contributors can reduce the time it takes to share content while also improving course categorization and searchability.

Virtual coaches, will also act as a great enabler for learning professionals. Targeted coaching will push learners towards the right learning at the right time (instead of overloading them with quantity), without the need to dedicate extra time or manpower to the task.

We also see that content strategies will begin to be combined with delivery strategies to maximize the potential of the content.

Enterprise E-Learning Trends 2020

Learning Impact

TREND Learning Effectiveness

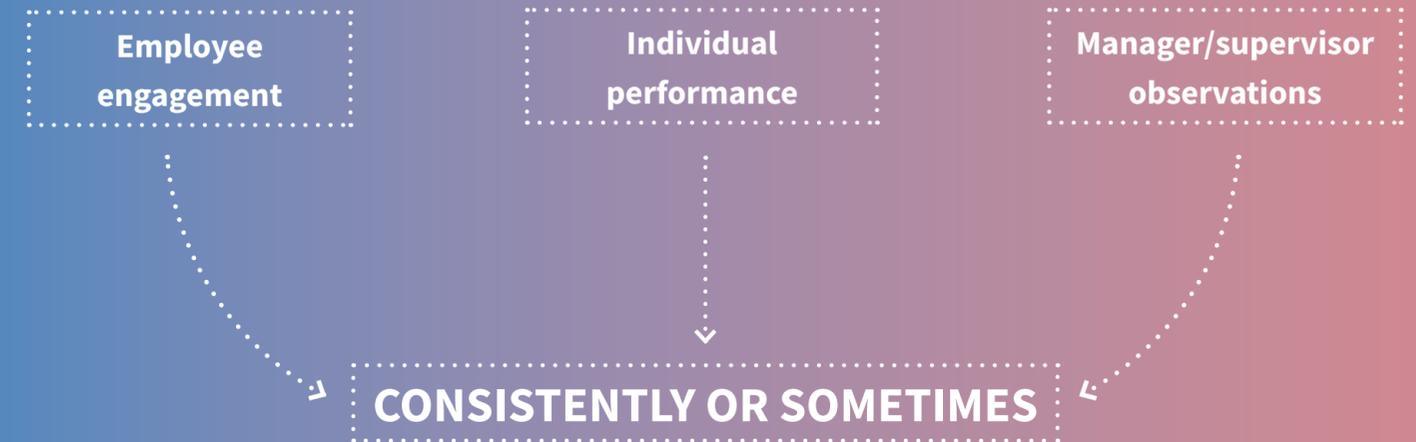
WHAT'S DRIVING THIS?

In today's climate, a new generation of employees are demanding a focus on building and developing skills. Not only does this put more pressure on L&D departments to get their learning programs right, but HR also feels the strain as a lack of effective learning often results in high turnover rates.

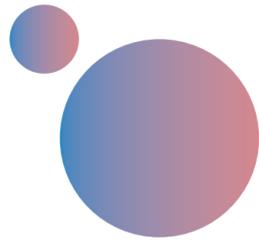
Throughout this report, we have stressed the need for learning programs to be adaptive in real-time, as learners want more, and businesses expect employees to apply their newly-acquired skills to their jobs. But measuring the value and effectiveness of your L&D programs, while proving its effectiveness and impact, isn't always cut and dry.

Measuring learning impact can be a cumbersome, time-consuming, and incredibly manual process that can often result in low response rates with no reference or benchmarks of what success looks like. The key first step, however, should be to determine what the objectives are for your learning program and how they are tied to your business objectives. Only after that, should you look into proper evaluation solutions.

To what degree are the following outcomes used to measure your organization's learning programs?



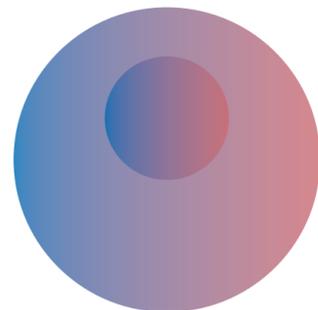
Source: Brandon Hall Group - Learning Measurement 2019



SOLUTIONS IN THE MARKET

Learning Platform integrations with learning evaluation tools are enabling learning teams with ready-to-go surveys and reports that focus on letting you make data-driven decisions faster. These surveys are delivered to learners when they complete a course and then three months later to determine behavior change. The key here is to use this data to optimize your learning going forward – it should be treated as a continuous cycle of improvement.

A sophisticated, automated surveying capability makes assessing learning programs both thorough and fast at the same time. Some solutions also come with built-in industry benchmarks, gathered from a database of survey responses to help provide an objective, balanced assessment to measure learning.



“The first thing organizations have to do is stop building learning with no objectives. That’s the number one thing. If you don’t understand what the specific organizational objectives are, how do you know what learning to create? And more importantly, how do you know how to measure it?”

“Learning organizations have ignored it, so get out there, understand what people want, create an ROI that’s more business-minded and then they’ll be better off.”

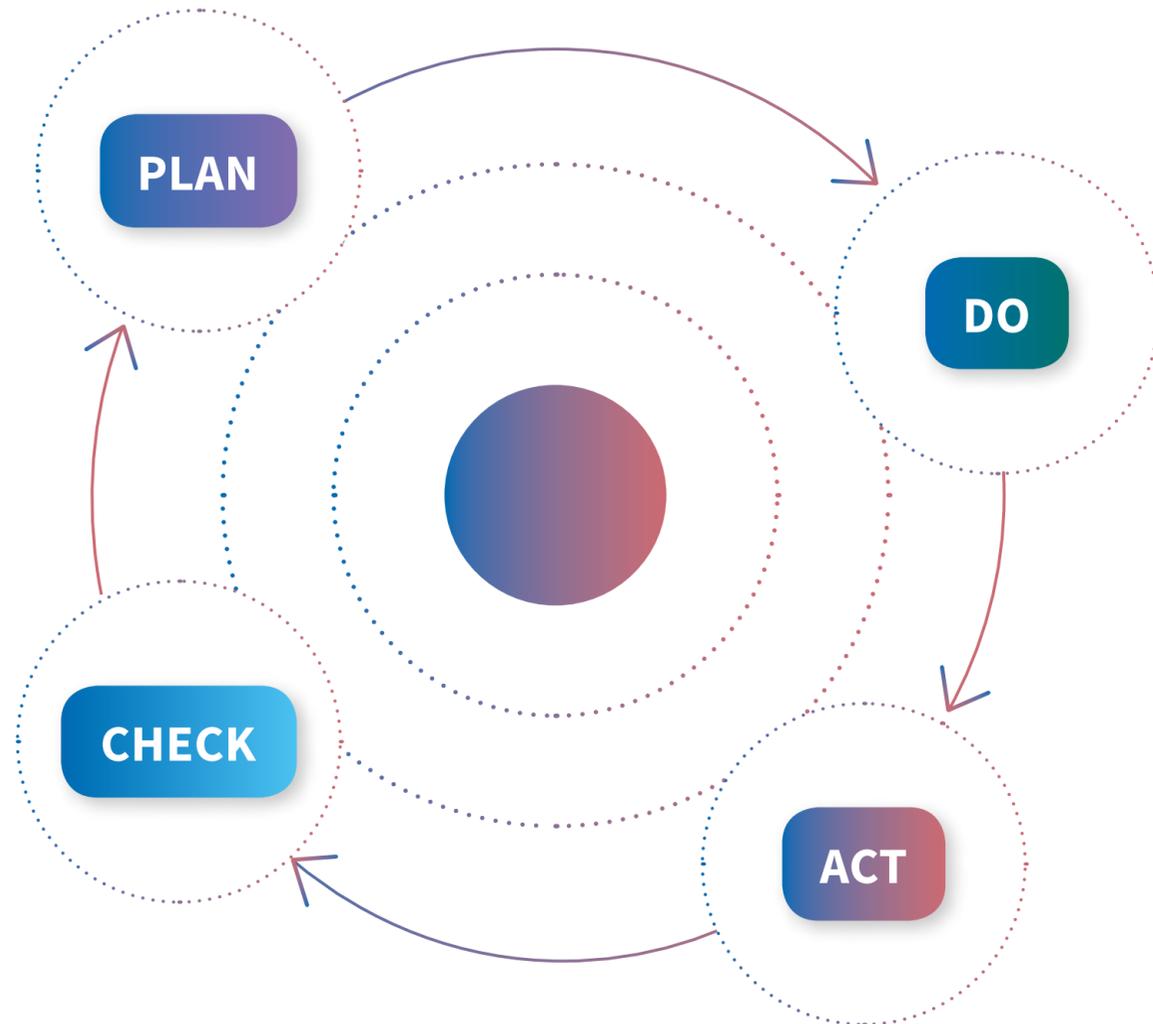
“Just like the rest of the company has customers, the learning organization has a client base too, it’s called the employees, and their managers. Learning organizations have to be more service minded.”

Michael Rochelle, Chief Strategy Officer and Principal HCM Analyst at Brandon Hall Group

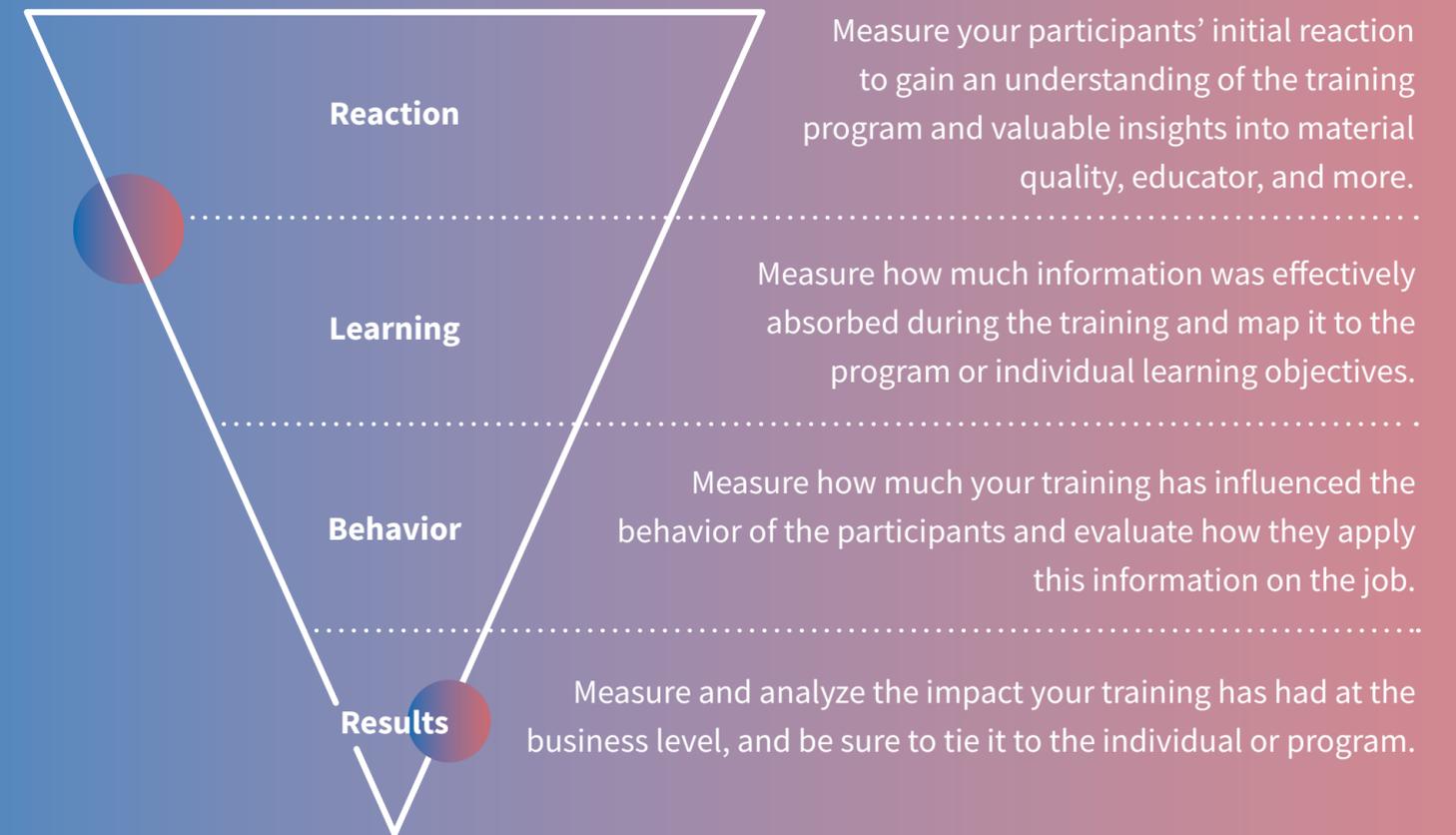
WHAT THE FUTURE HOLDS

Going forward, the first step is to understand that learning must always be connected to business objectives if you're going to prove a measurable impact and understand ROI, which is easier said than done. From there, evaluation can be a much more accurate process and technology can help you to scale it, especially as it gets more mature in this space.

Evaluation and Optimization is Continuous



Kirkpatrick Model of Measuring Learning



TREND The Evolution of People Analytics

WHAT'S DRIVING THIS?

As individual performance and business performance become more connected, organizations are looking to find ROI in their employees, and want to know how they can make smarter and more strategic decisions about the people they hire.

People analytics allows organizations to make smarter hiring decisions, retain top talent, and increase employee performance.

This task used to rely on managers' instincts but, as these metrics become more important, data science and machine learning have been leveraged to automate these findings and provide a more accurate picture.

“Business leaders don't care about people analytics, they care about business analytics. So the underlying message there: don't operate in a vacuum with your people data and people analytics.”

The demand now is to connect your HR and learning analytics to all other functions like finance, projects, and sales, so you're providing the holistic picture of the operation, and your people are in the middle of everything.”

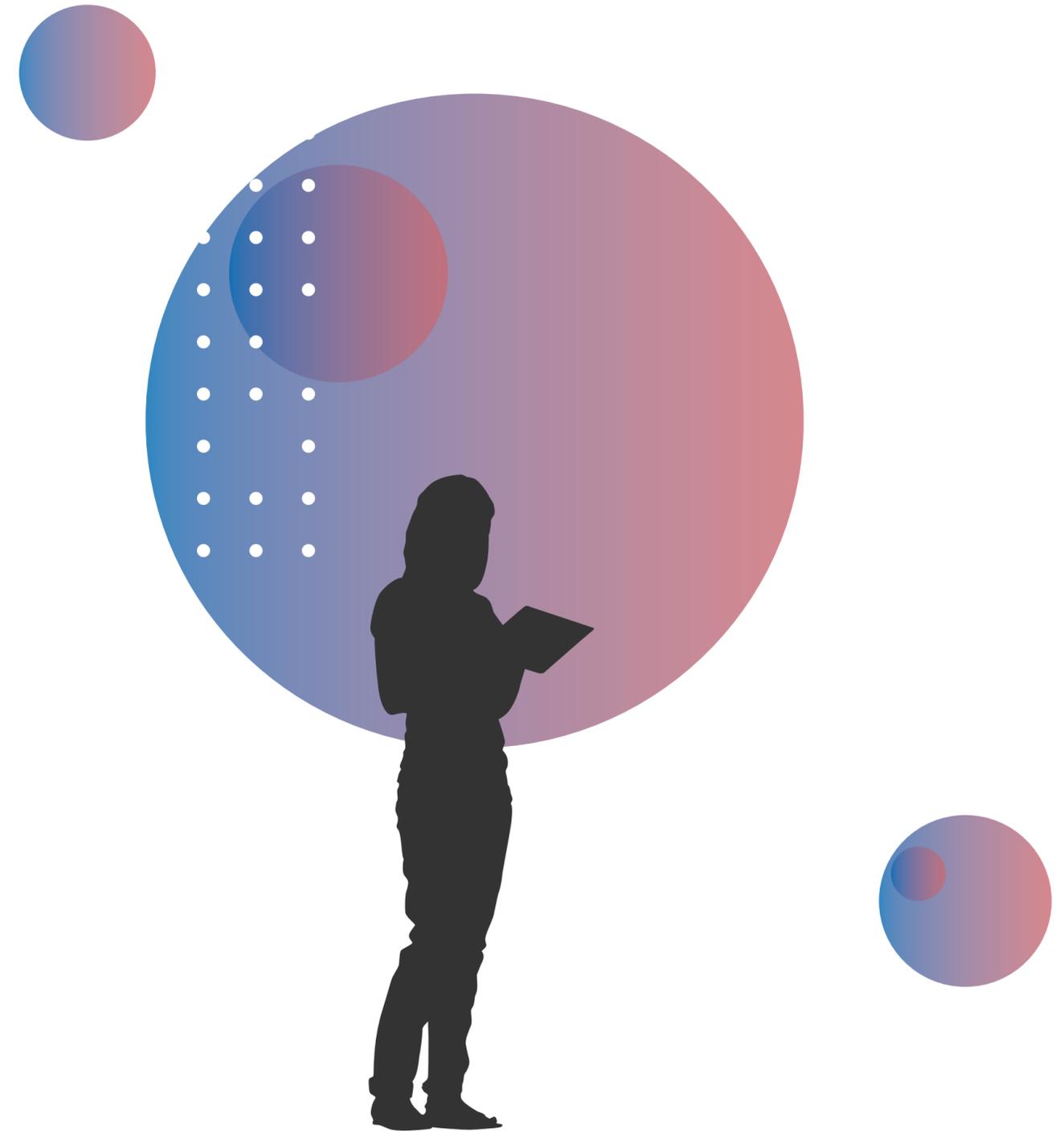
Steve Goldeberg, VP and Research Director, HCM at Ventana Research

SOLUTIONS IN THE MARKET

Learning vendors offer various reporting features aimed at determining best practices for recruitment, learning, managing, and developing teams. But the next step is for business analytics and people analytics to be combined in order to provide a holistic picture of how a business is performing. This information helps organizations to then create, manage, and execute strategies based upon the business need.

As a reaction to this, we see systems taking an investigative approach to people analytics, guiding admins on what mix of data to draw from to understand what has gone right or wrong.

For example, if headcount decreased in a line of business, why did it happen? There might have been a restructuring, maybe the organization was hiring less experienced managers, maybe they were spending less on learning and development. A centralized analytics function that takes everything into account supports you in understanding the full picture and then taking the right actions.



Conclusion

The e-learning trends outlined here should be viewed as exciting opportunities to leverage evolving technology to help reach personal and business goals. But what should be your biggest take-away? Always put your people first.

Technology is nothing without having the right people and processes to drive it. Hire great people that build great processes and use technology to scale those processes. Always make the technology work for you. It is a great resource and its potential is only limited by an inability to maximize its effectiveness.

Instead of relying on technology to pull you out of a rut or bolster business performance, invest in your workforce and optimize employee performance from within.

When employees can grow within the organization, they stop looking at the company benefits package and more at their own potential within your organization. This mindset in itself should, and will, change the way that technology is used to support learning internally and externally – and your business will thank you for it.

Docebo strives to be your partner in this journey, making your processes more effective and efficient, and scaling with you by adding additional functionality as your organization adapts and improves. The next era of enterprise learning is here and with it comes the potential to elevate learning's impact on the wider organization.



“If you think about society as a pendulum, the pendulum swung way too far to the right over the last 30 to 40 years and now it’s coming back to the middle again. Gen Y, Millennials, and Gen Z are already re-shaping the workforce. They have a lot in common with the traditionalists who used to invest in employees to drive long-term business value and that is a forcible shift that’s now having an impact.”

Zachary Chertok, Research Analyst at Aberdeen Group

MAKE LEARNING YOUR COMPETITIVE ADVANTAGE

Trusted by more than 1,600 companies worldwide, the Docebo Learning Platform brings together the enterprise LMS you need, the social learning experience your learners want, and the power of Artificial Intelligence to make learning your competitive advantage.

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