2018 L&D Innovations Bullseye

Mapping L&D Innovations by Adoption, Current Impact, and Future Investment

CEB **Learning & Development Leadership Council**

CEB
is now **Gartner.**

Note: This presentation has been enhanced with some key interactive elements. Below is a legend of these items that you will see throughout the document for quick reference.

▶▶ Forward	◀◀ Back	⤋ Sort

Confidentiality and Intellectual Property

Legal Caveat

LEARNING INNOVATIONS

The learning landscape is changing fast, the line's skill needs are becoming more complex, and employees' learning preferences are evolving. Advances in learning technology and learning methodologies provide new opportunities for L&D to design and deliver meaningful learning experiences. To help you navigate the changing learning landscape, we deployed our annual survey on learning innovations to over 300 L&D professionals from around the world. Results from our survey provide an objective map of how learning channels, learning methods, and learning management system (LMS) features are being adopted, their impact on employee development, and where L&D professionals plan to invest in the future.

Participating L&D Professionals Demographics
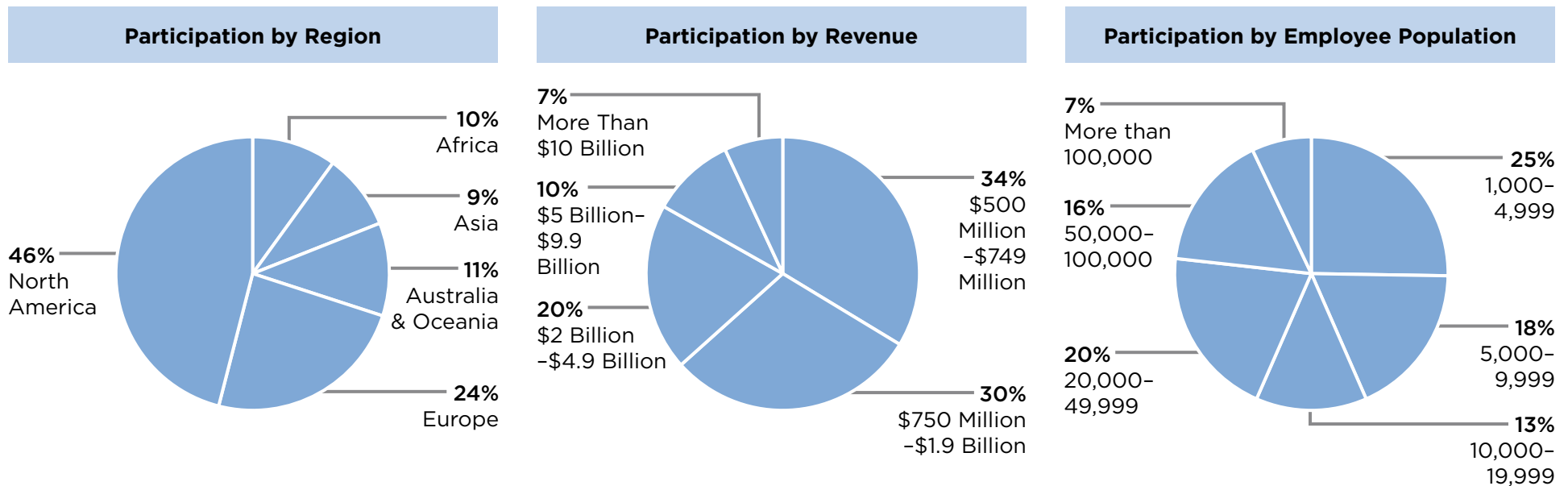
Participation by Region

- 10% Africa
- 9% Asia
- 11% Australia & Oceania
- 24% Europe
- 46% North America

Participation by Revenue

- 7% More Than $10 Billion
- 10% $5 Billion–$9.9 Billion
- 20% $2 Billion–$4.9 Billion
- 34% $500 Million–$749 Million
- 30% $750 Million–$1.9 Billion

Participation by Employee Population

- 7% More than 100,000
- 16% 50,000–100,000
- 20% 20,000–49,999
- 25% 1,000–4,999
- 18% 5,000–9,999
- 13% 10,000–19,999

n = 305.
Source: CEB 2018 Learning Innovations Survey.
Note: Totals may not equal 100% due to rounding.

HOW TO USE THE L&D INNOVATIONS BULLSEYE

| Step 1:
Benchmark | Step 2:
Learn | Step 3:
Enable |

Read the L&D Innovations Bullseye to:

- Learn about adoption levels, current impact, and future investment in 46 different learning technologies and innovations.
- Find out the top innovations for 2017–2018.

Explore the L&D Innovations Bullseye Builder to:

- Build an Innovations Bullseye specific to your organization.
- Compare your current approach to the innovations bullseye benchmark.

Visit the Learning Technology Center to:

- Explore best practices that you can adopt for each innovation.
- Get detailed action-oriented resources that will help you implement them.

Use the Learning Technology Strategy Playbook to:

- Design your learning technology strategy.
- Ensure a smooth implementation of your learning technology strategy.

Use the CEB Ignition™ Guide to Selecting an L&D Vendor to:

- Select and contract with a vendor.
- Prepare the selected vendor for effective implementation.

Source: CEB analysis.

KEY FINDINGS

Learning Channels

Digital is King—L&D is shifting investments away from classroom-based learning to digital channels.

1. **Classroom-Based Learning:** L&D professionals still consider classrooms one of the best ways to learn, but less than one-third are planning to increase investment in it.

2. **Online Video Learning:** Adoption of online video learning has surged, and the percentage of L&D professionals who are using or planning to use it has increased by eight percentage points since last year.

3. **Learning Portals:** Even though learning portals are one of the more embedded learning channels, 44% of L&D professionals are planning to increase investment in the next two years.

Learning Methods

Experimentation Mode—Having established its capability using traditional learning methods, L&D is trying more experimental methods like artificial intelligence.

4. **Artificial Intelligence:** Although L&D professionals are unsure of its potential impact, 92% want to maintain or increase investment in artificial intelligence.

5. **In-Person Simulations:** The percentage of L&D professionals using or planning to use in-person simulations has grown by 18 percentage points as L&D increasingly bets on it to drive learning application.

6. **Team-Based Development Action Plans:** There is growing confidence in the potential impact of team-based development action plans, as it jumps four places to become one of the three highest-impact learning methods this year.

LMS Features

More Than a System of Record—Learning management systems (LMS) are no longer just content libraries, as they become personalized based on learners' and L&D's needs.

7. **Custom User Interfaces:** Only 40% of L&D professionals believe custom user interfaces have a high impact on employee performance, but they are investing the most in it.

8. **Enabling Learning Evaluation:** Due to its high impact, the percentage of L&D professionals who want to increase investment in enabling learning evaluation rose 10 percentage points last year.

Source: CEB analysis.

- For example, mobile learning is categorized as a learning channel.
  - The dot for mobile learning is in the middle ring, showing that organizations are adopting it.
  - The dot for mobile learning is large, showing that current impact levels are high.
  - The dot for mobile learning is orange, showing that expected future investment is medium.

THE L&D INNOVATIONS BULLSEYE
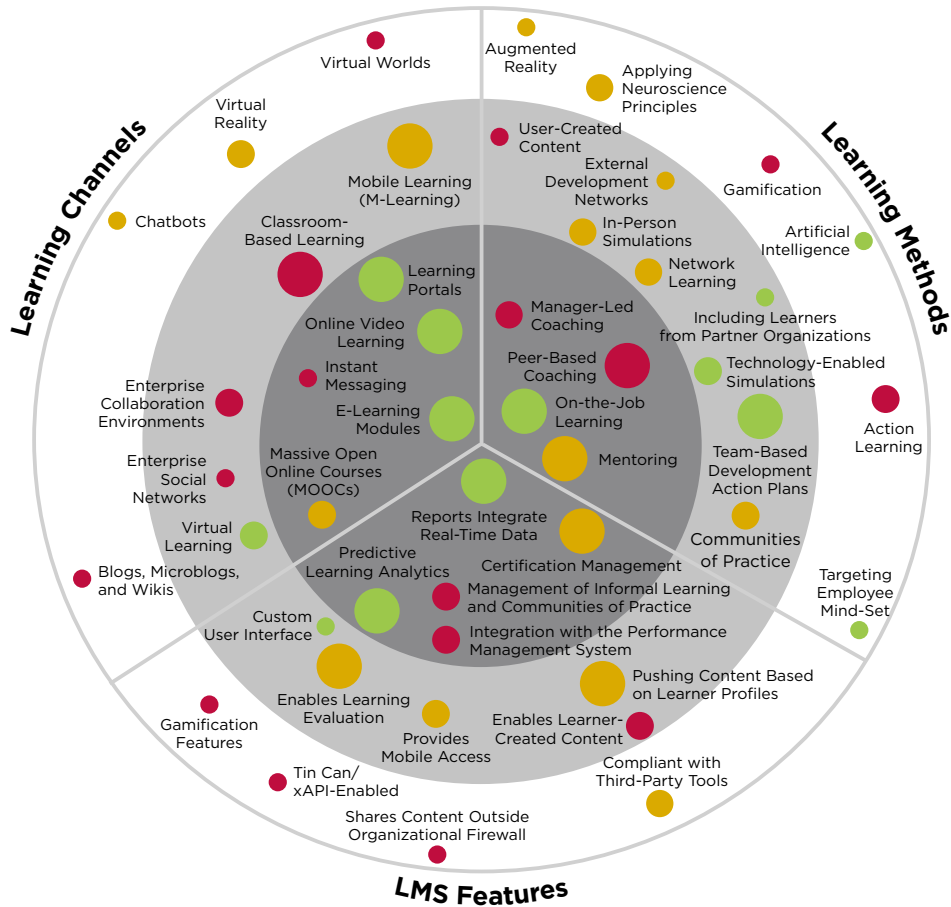
n = 305.

Source: CEB 2018 Learning Innovations Survey.

Note: Items are scored relative to one another in each section.

Assessment Factors

Adoption Level

Experimenting   Adopting   Embedded

Degree of adoption is measured by extent and nature of deployment across organizations.
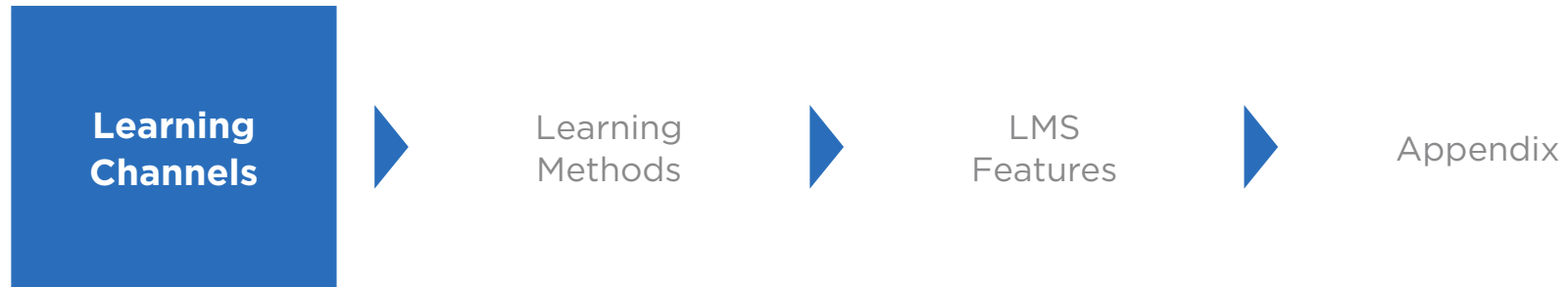
Current Impact

Low   Medium   High

Current level of impact is based on level of value delivered by the learning and development process.

Future Investment

Low   Medium   High

Future outlook is based on the projected level of investment in the next two years.

ROADMAP

Learning Channels   ▶   Learning Methods   ▶   LMS Features   ▶   Appendix
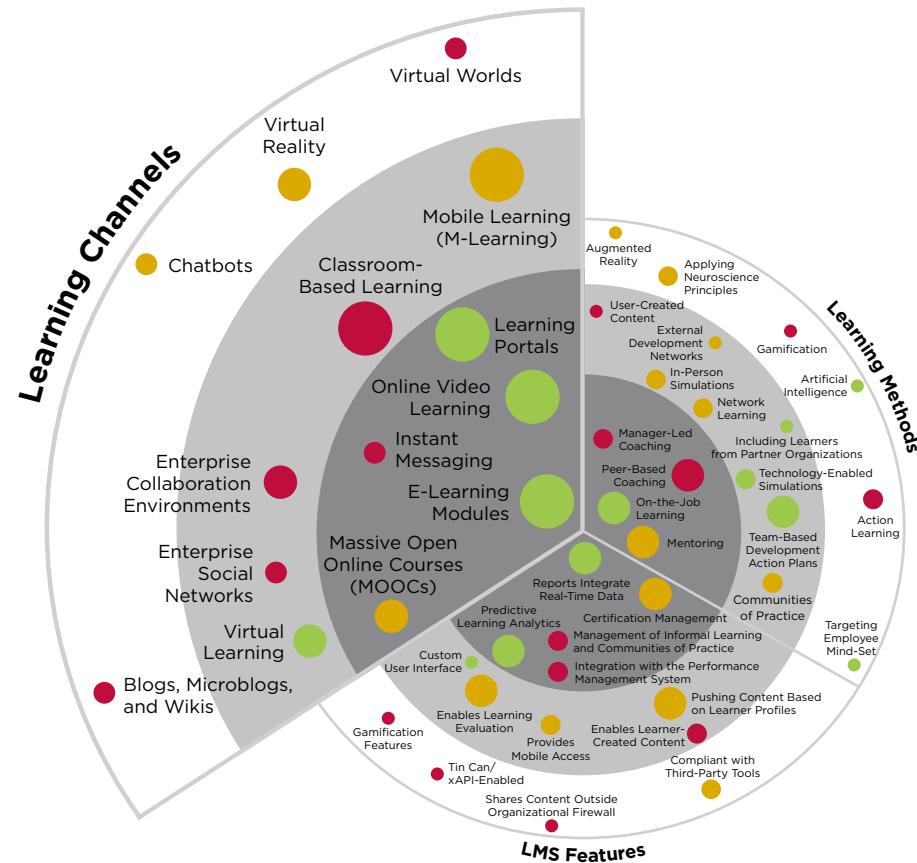
LEARNING CHANNELS

L&D is shifting investments away from classroom-based learning to digital channels.

- Learning channels are distribution mediums that L&D uses to deliver learning to employees.

- Examples of learning channels include traditional approaches, such as classroom-based learning, and technologies, such as instant messaging, learning portals, and enterprise social networks.

Learning Channels

Learning Methods

- Virtual Worlds
- Augmented Reality
- Applying Neuroscience Principles
- Virtual Reality
- User-Created Content
- External Development Networks
- Gamification
- Mobile Learning (M-Learning)
- Chatbots
- Classroom-Based Learning
- In-Person Simulations
- Artificial Intelligence
- Network Learning
- Learning Portals
- Manager-Led Coaching
- Including Learners from Partner Organizations
- Online Video Learning
- Peer-Based Coaching
- Technology-Enabled Simulations
- Instant Messaging
- Enterprise Collaboration Environments
- E-Learning Modules
- On-the-Job Learning
- Action Learning
- Enterprise Social Networks
- Mentoring
- Team-Based Development Action Plans
- Massive Open Online Courses (MOOCs)
- Virtual Learning
- Reports Integrate Real-Time Data
- Communities of Practice
- Blogs, Microblogs, and Wikis
- Predictive Learning Analytics
- Certification Management
- Targeting Employee Mind-Set
- Management of Informal Learning and Communities of Practice
- Custom User Interface
- Integration with the Performance Management System
- Enables Learning Evaluation
- Provides Mobile Access
- Enables Learner-Created Content
- Pushing Content Based on Learner Profiles
- Gamification Features
- Tin Can/xAPI-Enabled
- Compliant with Third-Party Tools
- Shares Content Outside Organizational Firewall

n = 305.

Source: CEB 2018 Learning Innovations Survey.

Note: Items are scored relative to one another in each section.

Assessment Factors

Adoption Level

Experimenting — Adopting — Embedded

Degree of adoption is measured by extent and nature of deployment across organizations.

Current Impact

Low — Medium — High

Current level of impact is based on level of value delivered by the learning and development process.

Future Investment

Low — Medium — High

Future outlook is based on the projected level of investment in the next two years.

- Half of L&D professionals still believe that classroom learning has a high impact on employee performance.

- However, the percentage of L&D professionals who have been using classroom learning for some time has decreased by seven percentage points since last year.

- Moreover, less than one-third of L&D professionals are planning to increase investment in classroom learning over the next two years.

CLASSROOM-BASED LEARNING: LOSING GROUND

ADOPTION	CURRENT IMPACT	FUTURE INVESTMENT

74% of L&D professionals are using or planning to use classroom-based learning.

n = 305.
Source: CEB 2018 Learning Innovations Survey.

51% of L&D professionals say classroom-based learning has a high impact on employee performance.

n = 305.
Source: CEB 2018 Learning Innovations Survey.

32% of L&D professionals are planning to increase investment in classroom-based learning in the next two years.

n = 305.
Source: CEB 2018 Learning Innovations Survey.

Most Adopted Learning Channels
Adoption Rank

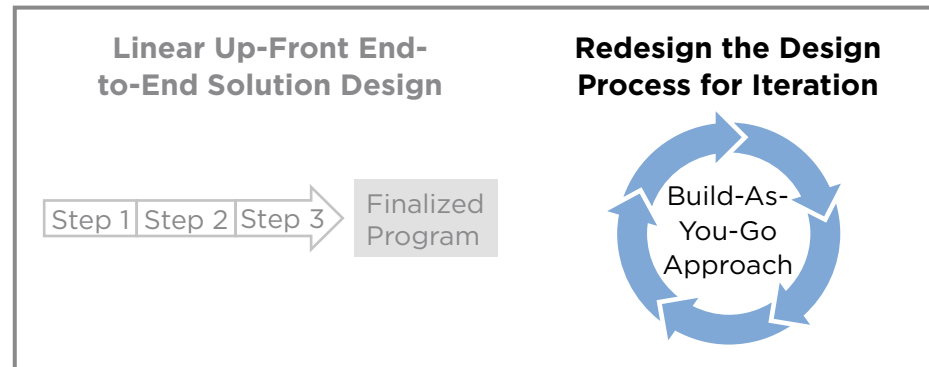| Learning Channel	2018 Rank	Change Since 2017
E-Learning Modules	1	—
Online Video Learning	2	▲ 5
Instant Messaging	3	▲ 1
Learning Portals	4	▼ 1
Massive Open Online Courses (MOOC)	5	▲ 4
Classroom-Based Learning	**6**	▼ **4**

n = 305.
Source: CEB 2018 Learning Innovations Survey.

Rather than trying to predict future leadership needs, William Hill adopted an adaptive approach to its HIPO development program design.
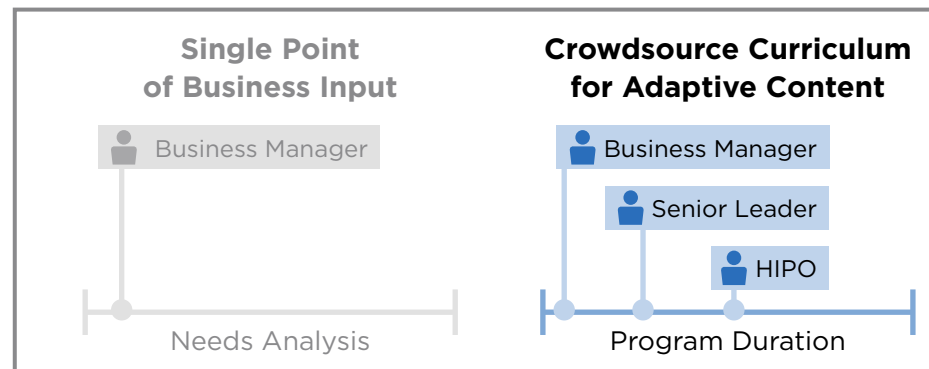
AN ADAPTIVE APPROACH TO PROGRAM DESIGN
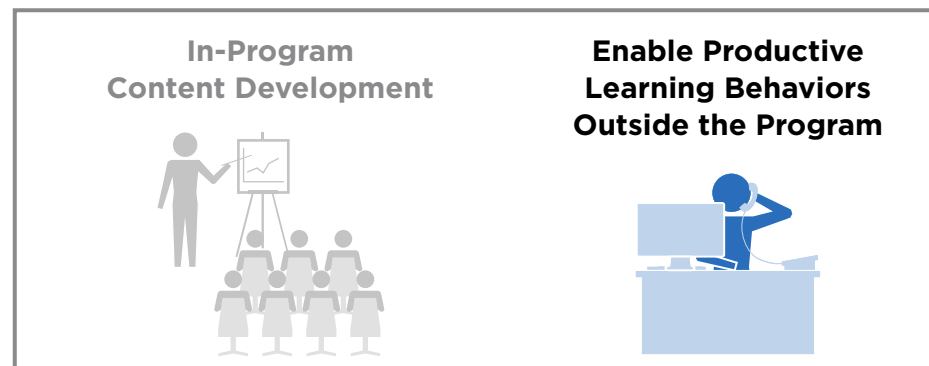
Components of Adaptive HIPO Development Design

Benefits of Adaptive Approach

Linear Up-Front End-to-End Solution Design

Step 1 | Step 2 | Step 3 → Finalized Program

Redesign the Design Process for Iteration

Build-As-You-Go Approach

✔ Faster, more iterative nature to program design

Single Point of Business Input

Business Manager

Needs Analysis

Crowdsource Curriculum for Adaptive Content

Business Manager

Senior Leader

HIPO

Program Duration

✔ Recalibrated development focus for changing business and HIPO needs

In-Program Content Development

Enable Productive Learning Behaviors Outside the Program

✔ Productive learning behaviors both inside and outside the program

Source: William Hill plc; CEB analysis.

Redesign your classroom courses using William Hill's iterative and learner co-authored approach to HIPO development.
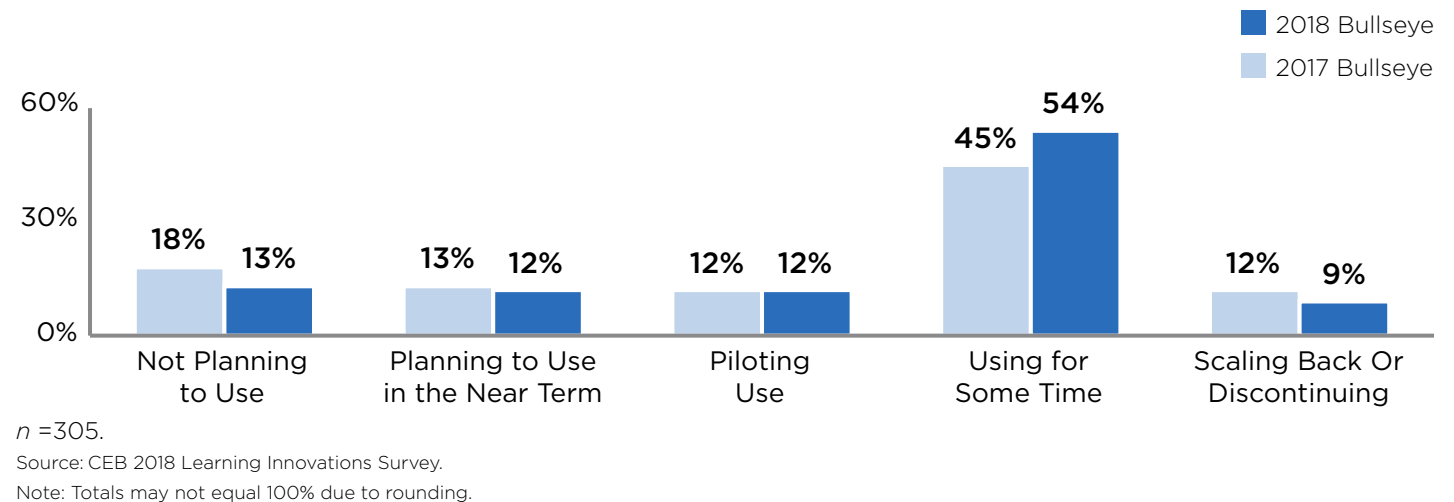
ONLINE VIDEO LEARNING: RISING ADOPTION

Given its high current impact, the use of video learning is becoming an embedded part of the L&D portfolio.

- Online video learning is one of the top five learning channels by current impact.

- The percentage of L&D professionals who are either using or planning to use online video learning has increased by eight points since last year.

- It is also the learning channel where L&D professionals want to invest the most in the next two years.

ADOPTION

78% of L&D professionals are using or planning to use online video learning.

n = 305.
Source: CEB 2018 Learning Innovations Survey.

CURRENT IMPACT

51% of L&D professionals say online video learning has a high impact on employee performance.

n = 305.
Source: CEB 2018 Learning Innovations Survey.

FUTURE INVESTMENT

40% of L&D professionals are planning to increase investment in online video learning in the next two years.

n = 226.
Source: CEB 2018 Learning Innovations Survey.

Extent of Deployment of Online Video Learning
Percentage of L&D Professionals

Legend:
- 2018 Bullseye
- 2017 Bullseye

	Not Planning to Use	Planning to Use in the Near Term	Piloting Use	Using for Some Time	Scaling Back Or Discontinuing
2017 Bullseye	18%	13%	12%	45%	12%
2018 Bullseye	13%	12%	12%	54%	9%

n =305.
Source: CEB 2018 Learning Innovations Survey.
Note: Totals may not equal 100% due to rounding.

- Xerox realized it could drive employee contributions and consumption of learning by ensuring the videos were employee owned, actionable, unscripted, and generated on the job, rather than a certain standard of video production quality.

- L&D can also spotlight specific videos that it thinks most employees need to see, which are then highlighted at the top of XstreamVideo.

Boost the impact of online video learning by exploring how Xerox enabled learners to create and share unscripted, relevant, and actionable videos.

FOCUS ON LEARNER DEFINITION OF BUSINESS VALUE

Learner Definition of Valuable Contributions

✔ **Employee owned**, not just from L&D

✔ **Direct and actionable,** rather than providing unnecessary information

✔ **Unscripted,** rather than formal

✔ **Generated from the workplace or field,** not a video studio

The Power of Video reinforces how quickly employees can create content with business impact, even without high video production quality.
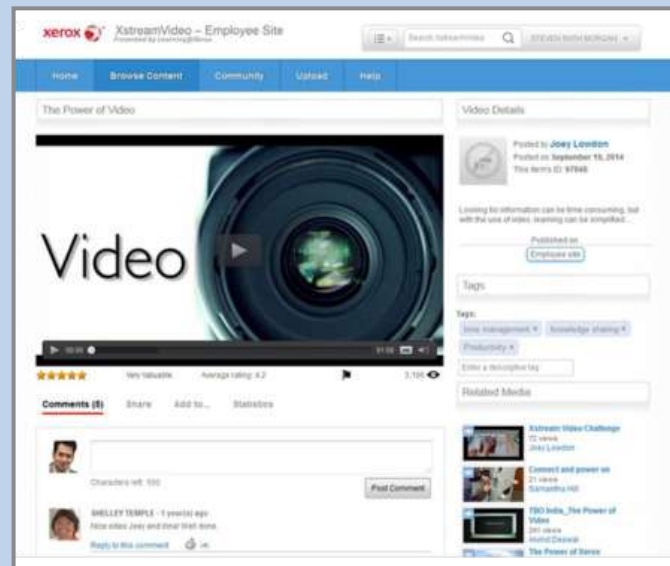
Employee Guide to XstreamVideo

Why Contribute to XstreamVideo:

- Get recognized for your knowledge and leadership skills.
- Solve a common work challenge your colleagues face.
- Share visual information about a work situation.

How to Create in XstreamVideo:

- Subject matter is more important than production quality.
- Focus on real-world, not theoretical, application.
- Just use your webcam or smartphone to record yourself on the go; then upload.
- See what your peers think through the comments and ratings after you post your video.

Source: Xerox Corporation; CEB analysis.

LEARNING PORTALS: HERE TO STAY

Even though learning portals are firmly embedded, L&D plans to keep increasing investment in it.

- Due to their very high impact, learning portals have become embedded in most organizations.

- The percentage of L&D professionals who plan to increase investment in learning portals has increased by eight points since last year.

ADOPTION	CURRENT IMPACT	FUTURE INVESTMENT

76% of L&D professionals are using or planning to use learning portals.

n = 305.
Source: CEB 2018 Learning Innovations Survey.

51% of L&D professionals say learning portals have a high impact on employee performance.

n = 305.
Source: CEB 2018 Learning Innovations Survey.

44% of L&D professionals are planning to increase investment in learning portals in the next two years.

n = 305.
Source: CEB 2018 Learning Innovations Survey.

Expected Level of Investment in Learning Portals Over the Next Two Years
Percentage of L&D Professionals
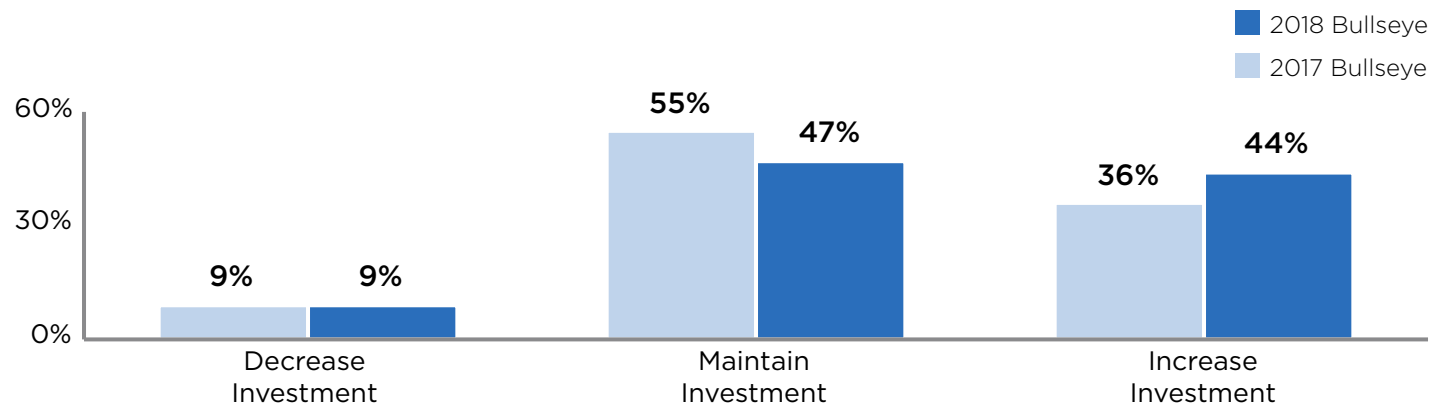
Legend:
- 2018 Bullseye
- 2017 Bullseye

	Decrease Investment	Maintain Investment	Increase Investment
2017 Bullseye	9%	55%	36%
2018 Bullseye	9%	47%	44%

n = 305.
Source: CEB 2018 Learning Innovations Survey.
Note: Totals may not equal 100% due to rounding.

- L&D continually curates a cloud-based marketplace of internal and external development offerings.

- Development offerings range from coaching and mentoring to custom input experiential learning.

- Using an app that can manage thousands of development plans has made it easier for L&D to manage programs as well as track and stay connected with participants.

Learn how Microsoft personalized their learning portals by implementing learning paths that are also private.

CUSTOMIZE AND INTEGRATE TOUCHPOINTS

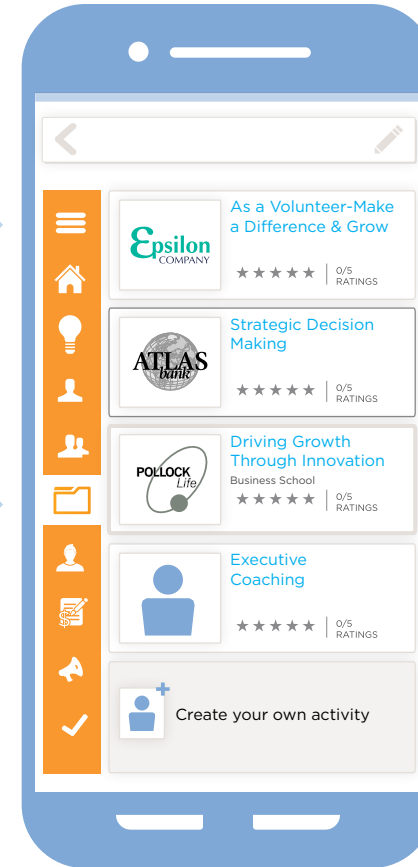Guide Leaders to Choose Their Own Development Paths

L&D's Role:
Curate Content for Each Leader

Curate for Quality Development:
Curate both internal and external L&D opportunities for leaders to add to their paths.

Ensure Personal Relevance:
Use the personalized lists from each leader's assessment to recommend development.

Leader Role:
Customize Your Own Path

Allow Individual Selection:
Allow leaders to customize their own development paths from L&D's curated list of options.

Go Beyond What's Offered:
Leaders can add on-the-job assignments and personal development initiatives to customize their development paths.

As a Volunteer-Make a Difference & Grow
Epsilon COMPANY
★★★★★ 0/5 RATINGS

Strategic Decision Making
ATLAS bank
★★★★★ 0/5 RATINGS

Driving Growth Through Innovation
POLLOCK Life
Business School
★★★★★ 0/5 RATINGS

Executive Coaching
★★★★★ 0/5 RATINGS

Create your own activity

Privacy Is Key to Personal Growth:
Because leaders work on deeply personal development during the ASPIRE program, each individual's learning path is kept private within the app and not shared with other leaders during the program.

Source: Microsoft India Corporation; CEB analysis.

Microsoft

LEARNING CHANNEL RANKINGS

Sorting	
↓≣	↓≣
Sorted By	Click to Sort

Adoption Level

◯	◯	●
Experimenting	Adopting	Embedded

Current Impact

◦	○	◯
Low	Medium	High

Future Investment

●	●	●
Low	Medium	High

n = 305.

Source: CEB 2018 Learning Innovations Survey.

Note: Degree of adoption is measured by extent and nature of deployment across organizations. Current level of impact is based on level of value delivered by the learning and development process. Future outlook is based on projected level of investment in the next two years.

ROADMAP

Learning Channels ▶ **Learning Methods** ▶ LMS Features ▶ Appendix

LEARNING METHODS

Having established its capability using traditional learning methods, L&D is trying more experimental methods like artificial intelligence.

- Learning methods are the approaches used to develop employees, which can be delivered through various learning channels.

- Examples of learning methods include mentoring, on-the-job learning, and gamification.

Learning Channels

Learning Methods

Virtual Worlds

Augmented Reality

Applying Neuroscience Principles

Virtual Reality

User-Created Content

External Development Networks

Gamification

Chatbots

Mobile Learning (M-Learning)

In-Person Simulations

Artificial Intelligence

Classroom-Based Learning

Network Learning

Learning Portals

Manager-Led Coaching

Including Learners from Partner Organizations

Online Video Learning

Peer-Based Coaching

Technology-Enabled Simulations

Instant Messaging

On-the-Job Learning

E-Learning Modules

Action Learning

Enterprise Collaboration Environments

Mentoring

Team-Based Development Action Plans

Enterprise Social Networks

Massive Open Online Courses (MOOCs)

Communities of Practice

Virtual Learning

Reports Integrate Real-Time Data

Certification Management

Targeting Employee Mind-Set

Blogs, Microblogs, and Wikis

Predictive Learning Analytics

Management of Informal Learning and Communities of Practice

Custom User Interface

Integration with the Performance Management System

Pushing Content Based on Learner Profiles

Gamification Features

Enables Learning Evaluation

Enables Learner-Created Content

Provides Mobile Access

Compliant with Third-Party Tools

Tin Can/ xAPI-Enabled

Shares Content Outside Organizational Firewall

n = 305.

Source: CEB 2018 Learning Innovations Survey.

Note: Items are scored relative to one another in each section.

Assessment Factors

Adoption Level

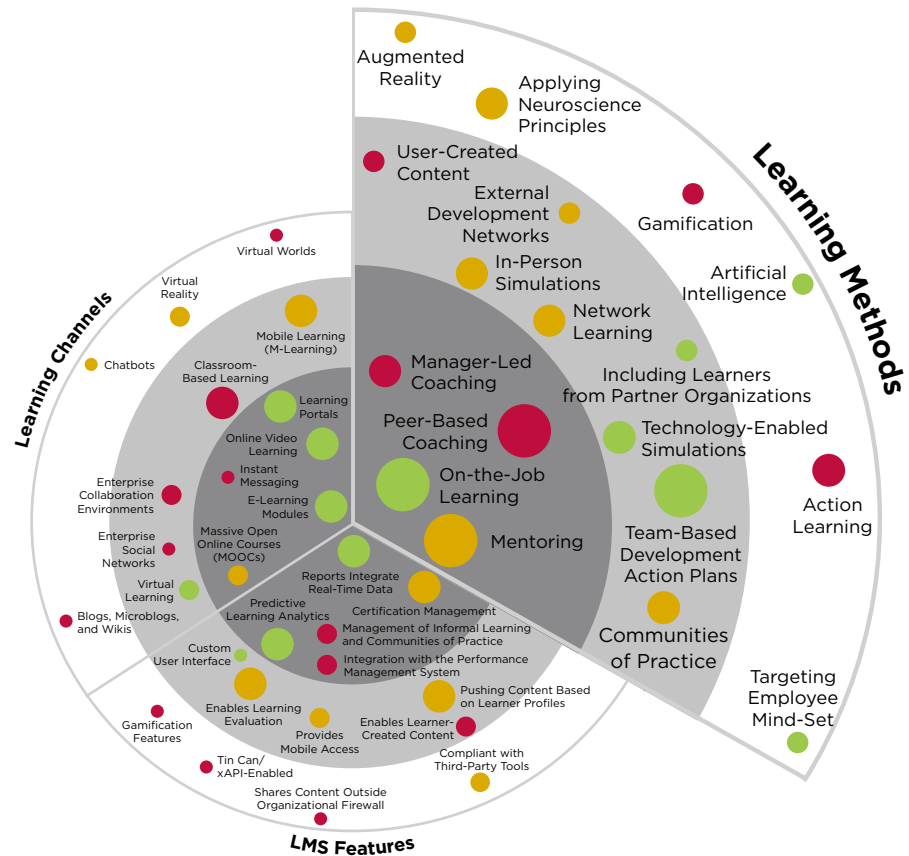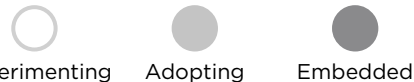| Experimenting	Adopting	Embedded

Degree of adoption is measured by extent and nature of deployment across organizations.

Current Impact

Low	Medium	High

Current level of impact is based on level of value delivered by the learning and development process.

Future Investment

Low	Medium	High

Future outlook is based on the projected level of investment in the next two years.

While L&D professionals are skeptical of artificial intelligence's current impact on employee performance, they are willing to bet on its future.

- Artificial intelligence is an emerging trend that has yet to demonstrate high impact on learning.

- Adoption remains low; one-third of L&D professionals still don't plan to use artificial intelligence at their organizations.

- However, the investment outlook is high, as more than 90% of L&D professionals are either planning to maintain or increase investment over the next two years.

ARTIFICIAL INTELLIGENCE: BETTING ON THE FUTURE

| ADOPTION | CURRENT IMPACT | FUTURE INVESTMENT |

58% of L&D professionals are using or planning to use artificial intelligence.

n = 305.
Source: CEB 2018 Learning Innovations Survey.

43% of L&D professionals say artificial intelligence has a high impact on employee performance.
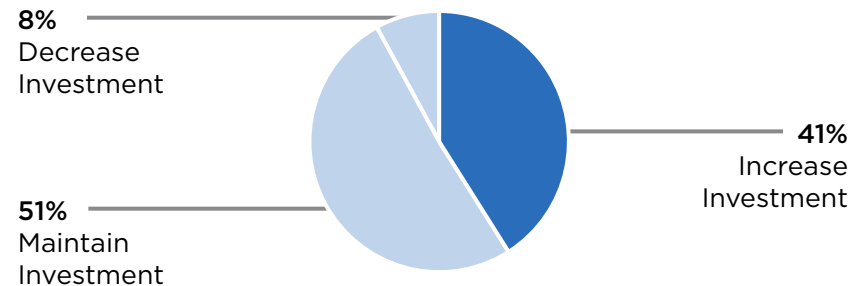
n = 305.
Source: CEB 2018 Learning Innovations Survey.

41% of L&D professionals are planning to increase investment in artificial intelligence in the next two years.

n = 305.
Source: CEB 2018 Learning Innovations Survey.

Expected Level of Investment in Artificial Intelligence Over the Next Two Years
Percentage of L&D Professionals

8% Decrease Investment

41% Increase Investment

51% Maintain Investment

n = 305.
Source: CEB 2018 Learning Innovations Survey.
Note: Totals may not equal 100% due to rounding.

IBM provides real-time advice, not just high-level guidelines, on how and when to coach and give feedback.

- App users are reminded not only when but also how to give good feedback, via directions that IBM gives within the ACE app.

- ACE is integrated with IBM's Watson Tone Analyzer service, which analyzes feedback text to help determine emotion.

Find out how IBM used artificial intelligence to remind learners when to give feedback, how to give it, and analyze text to determine emotion.

PUSH JUST-IN-TIME GUIDANCE FOR FEEDBACK

ACE Feedback Tab

Carly and Jeff have complained to me about your being too harsh with them. What's going on with that? You're also starting to develop a reputation as a complainer. Try to stay more positive. For example, you snapped at Carly in last week's meeting. You need to control your temper; you only care about yourself and you are completely self-absorbed!

Tip: Use this formula to structure your feedback and it starts with **Ready for a Checkpoint Moment?**   More

The Watson Tone Analyzer service just analyzed your feedback text at the sentence level to help determine the likelihood that an emotion tone is present. Only sentences with a score greater than 0.5 are highlighted.

Anger is present.

Evoked due to injustice, conflict, humiliation, negligence or betrayal. If anger is active, the individual attacks the target, verbally or physically. If anger is passive, the person silently sulks and feels tension and hostility.

You need to control your temper; you only care about yourself and you are completely self-absorbed!

Guide Employees on How, Not Just When:

IBM provides a simple feedback formula to remind managers and employees how to give effective feedback each time. They also show employees what emotions are present in their feedback, using the Watson Tone Analyzer service.

Ensure the App Doesn't Become a Crutch

When managers are prompted to give feedback to employees, they are reminded about what types of feedback are important to deliver in person instead of just in the app.

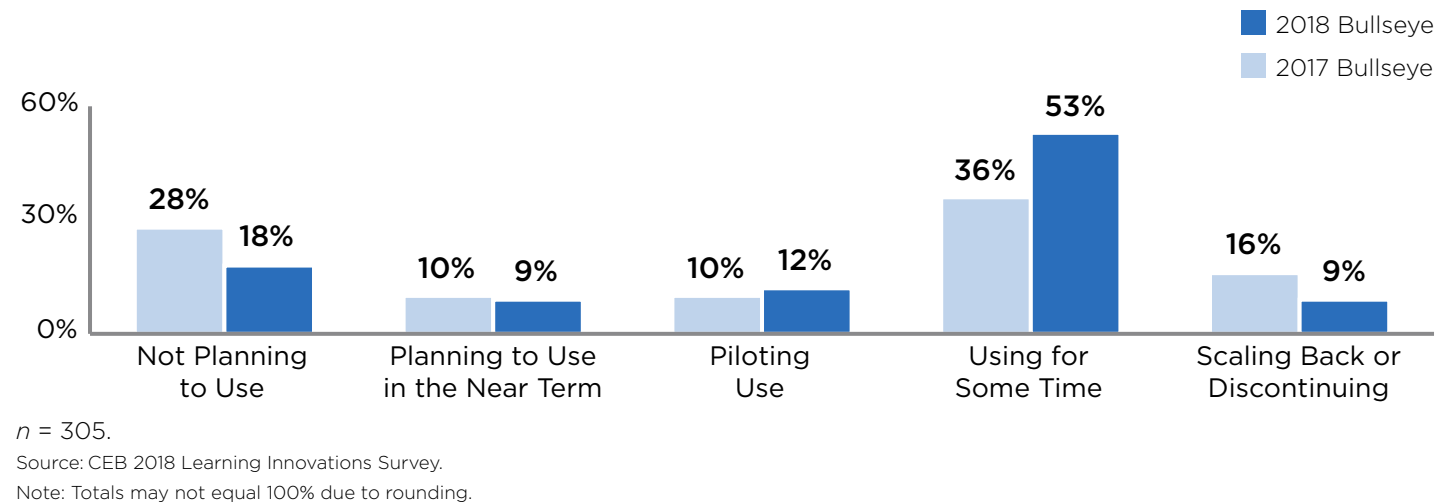Source: IBM Corporation; CEB analysis.

To increase application of classroom training, L&D professionals are adopting in-person simulations.

- The percentage of L&D professionals who are either using or planning to use in-person simulations increased by 18 points last year.

IN-PERSON SIMULATIONS: DRIVING APPLICATION

ADOPTION

74% of L&D professionals are using or planning to use in-person simulations.

n = 305.
Source: CEB 2018 Learning Innovations Survey.

CURRENT IMPACT

45% of L&D professionals say in-person simulations have a high impact on employee performance.

n = 305.
Source: CEB 2018 Learning Innovations Survey.

FUTURE INVESTMENT

35% of L&D professionals are planning to increase in-person simulation investment in the next two years.

n = 305.
Source: CEB 2018 Learning Innovations Survey.

Extent of Deployment of In-Person Simulations
Percentage of L&D Professionals

Legend:
- ■ 2018 Bullseye
- ■ 2017 Bullseye

Category	2017 Bullseye	2018 Bullseye
Not Planning to Use	28%	18%
Planning to Use in the Near Term	10%	9%
Piloting Use	10%	12%
Using for Some Time	36%	53%
Scaling Back or Discontinuing	16%	9%

n = 305.
Source: CEB 2018 Learning Innovations Survey.
Note: Totals may not equal 100% due to rounding.

Swiss Re designs their strategic dilemma simulations to mirror the way senior leaders perform in the new work environment.

- Most simulations are misaligned with performance in the new work environment, leaving leaders unprepared to navigate uncertain situations.

- Swiss Re's strategic dilemma simulations mirror performance in the new work environment by simulating future, unknown situations, creating risk for the individual, and focusing their debrief sessions on how leaders can flex their skills.
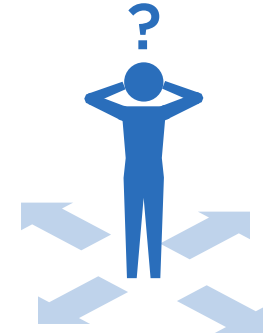
Implement Swiss Re's strategic dilemma simulations and make your in-person simulations future-focused, unpredictable, and risk oriented.

REFLECT REAL WORLD UNCERTAINTY IN SIMULATIONS

Typical Simulations Fail to Mirror the Uncertainty of the New Work Environment

Start   Finish
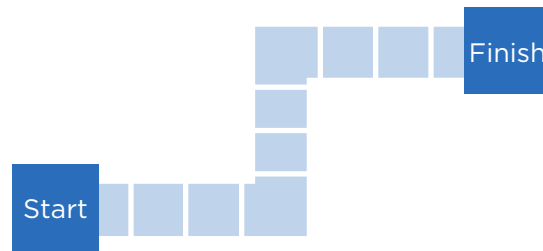
Swiss Re's Approach to Simulating the Uncertainty of the New Work Environment

?

✗ Existing Strategy
Simulations do not reflect the uncertainty and variability of the new work environment.

✗ Play
Leaders who know they are in a low-risk simulation will play along but do not feel pressure to perform.

✗ Repetition
Reflection focused on repetition equips leaders for that particular situation, not new ones.

✔ Strategic Dilemmas
Simulate future, unknown situations that do not have a right or wrong answer to mirror the uncertain and changing nature of the new work environment.

✔ Perform
Create risk to ensure that leaders perform as they would if confronted with new challenges in real life.
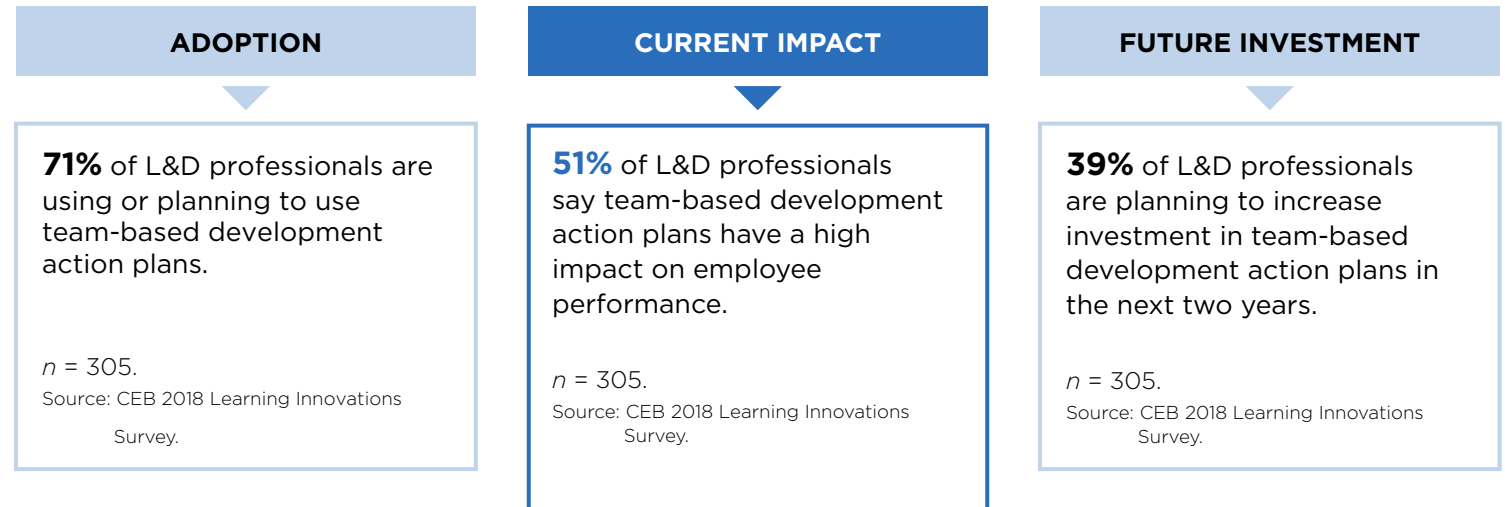
✔ Future Application
Focus reflection on future application to give leaders the confidence and capability to navigate new and uncertain situations in the future.

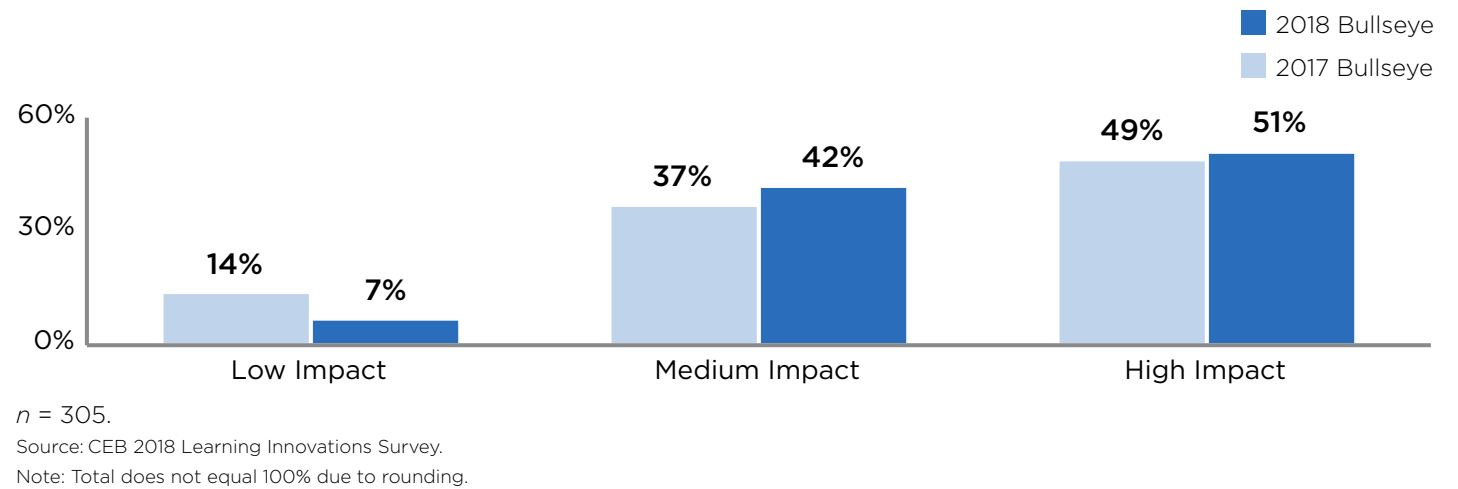Source: Swiss Re; CEB analysis.

Swiss Re

A growing number of L&D professionals are beginning to realize the impact of team-based development action plans on employee performance.

- Team-based development action plans jumped four places since last year to become the third highest-impact learning method this year.

- Almost two out of five L&D professionals want to increase investment in this learning method over the next two years.

TEAM-BASED DEVELOPMENT: GROWING IMPACT

ADOPTION	CURRENT IMPACT	FUTURE INVESTMENT

71% of L&D professionals are using or planning to use team-based development action plans.

n = 305.
Source: CEB 2018 Learning Innovations Survey.

51% of L&D professionals say team-based development action plans have a high impact on employee performance.

n = 305.
Source: CEB 2018 Learning Innovations Survey.

39% of L&D professionals are planning to increase investment in team-based development action plans in the next two years.

n = 305.
Source: CEB 2018 Learning Innovations Survey.

Degree to Which Team-Based Development Action Plans Have a Positive Impact on Employee Performance
Percentage of L&D Professionals

■ 2018 Bullseye
■ 2017 Bullseye

	Low Impact	Medium Impact	High Impact
2017 Bullseye	14%	37%	49%
2018 Bullseye	7%	42%	51%

n = 305.
Source: CEB 2018 Learning Innovations Survey.
Note: Total does not equal 100% due to rounding.

BUILD A MOTIVATING TEAM ENVIRONMENT

BP provides leaders with a view of what motivates their employees so leaders can tailor the team environment to what *employees* value, not just what *they* value.

- Instead of simply allowing leaders to set the tone to line up with their own preferences, BP gives leaders the tools to understand employee motivators and build the team environment accordingly.

- BP asks employees about their broad value systems, not just typical work tasks, to give managers better insight into employees' true preferences.

1. Launch Motivator Survey to Employees

Select your top five motivators!

PRESSURE ☐	ROUTINE ☐
You like working in deadlines.	You like a work routine that is fairly predictable.

BP orients motivators around **broad value systems, not just work tasks and activities**, to enable employees to better visualize motivators.

2. Show Leaders Each Employee's Top Motivators

The app provides leaders with a view of each of their team member's top five motivators.

Sarah Westerman

Challenge
You enjoy being "stretched" and given new problems to work on.

Variety
You enjoy having a lot of different things to do on a regular basis.

Recognition
You like people to show appreciation for the work you do.

3. Aggregate Motivators to Find Team Trends

BP compiles the top three motivators on the team to help leaders **position tasks and work in a way that aligns with the motivators**.

My team

TOP 3 MOTIVATORS IN YOUR TEAM

- X3 Help society
- X2 Work alone
- X1 Artistic

Source: BP p.l.c.; CEB analysis.

Enable managers to build better team environments using BP's approach to measuring and acting on team motivators.

LEARNING METHOD RANKINGS

Sorting

⬇	⬇
Sorted By	Click to Sort

Adoption Level

⚪	🔘	⚫
Experimenting	Adopting	Embedded

Current Impact

◦	○	◯
Low	Medium	High

Future Investment

🔴	🟡	🟢
Low	Medium	High

n = 305.

Source: CEB 2018 Learning Innovations Survey.

Note: Degree of adoption is measured by extent and nature of deployment across organizations. Current level of impact is based on level of value delivered by the learning and development process. Future outlook is based on projected level of investment in the next two years.

ROADMAP

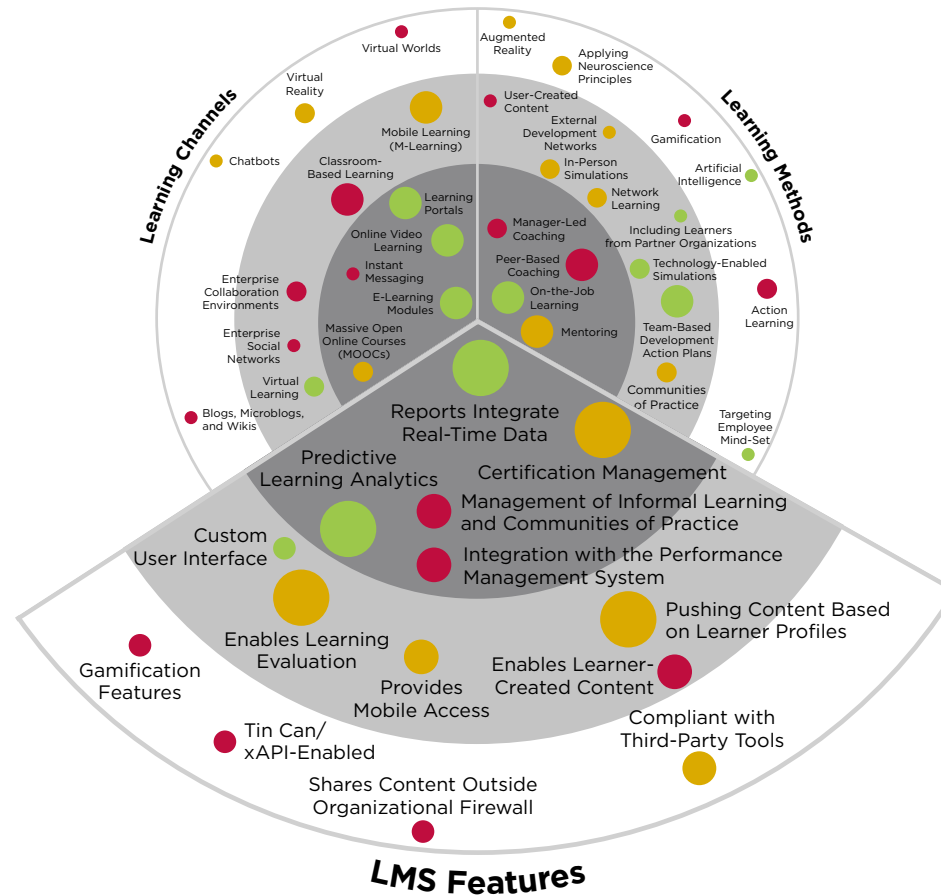Learning Channels ▶ Learning Methods ▶ **LMS Features** ▶ Appendix

Today's learning management systems (LMS) are no longer just content libraries, as they become increasingly personalized based on learners' and L&D's needs.

- LMS features are the components that are available as part of LMSs.

- LMS features include certification management, mobile access, and predictive learning analytics.

LMS FEATURES

Learning Channels

- Virtual Worlds
- Virtual Reality
- Chatbots
- Classroom-Based Learning
- Mobile Learning (M-Learning)
- Learning Portals
- Online Video Learning
- Instant Messaging
- E-Learning Modules
- Enterprise Collaboration Environments
- Enterprise Social Networks
- Massive Open Online Courses (MOOCs)
- Virtual Learning
- Blogs, Microblogs, and Wikis

Learning Methods

- Augmented Reality
- Applying Neuroscience Principles
- User-Created Content
- External Development Networks
- Gamification
- In-Person Simulations
- Artificial Intelligence
- Network Learning
- Manager-Led Coaching
- Including Learners from Partner Organizations
- Peer-Based Coaching
- Technology-Enabled Simulations
- On-the-Job Learning
- Action Learning
- Mentoring
- Team-Based Development Action Plans
- Communities of Practice
- Targeting Employee Mind-Set

LMS Features

- Reports Integrate Real-Time Data
- Predictive Learning Analytics
- Certification Management
- Management of Informal Learning and Communities of Practice
- Custom User Interface
- Integration with the Performance Management System
- Enables Learning Evaluation
- Pushing Content Based on Learner Profiles
- Provides Mobile Access
- Enables Learner-Created Content
- Gamification Features
- Compliant with Third-Party Tools
- Tin Can/xAPI-Enabled
- Shares Content Outside Organizational Firewall

n = 305.
Source: CEB 2018 Learning Innovations Survey.
Note: Items are scored relative to one another in each section.

Assessment Factors

Adoption Level

Experimenting | Adopting | Embedded

Degree of adoption is measured by extent and nature of deployment across organizations.

Current Impact

Low | Medium | High

Current level of impact is based on level of value delivered by the learning and development process.

Future Investment

Low | Medium | High

Future outlook is based on the projected level of investment in the next two years.
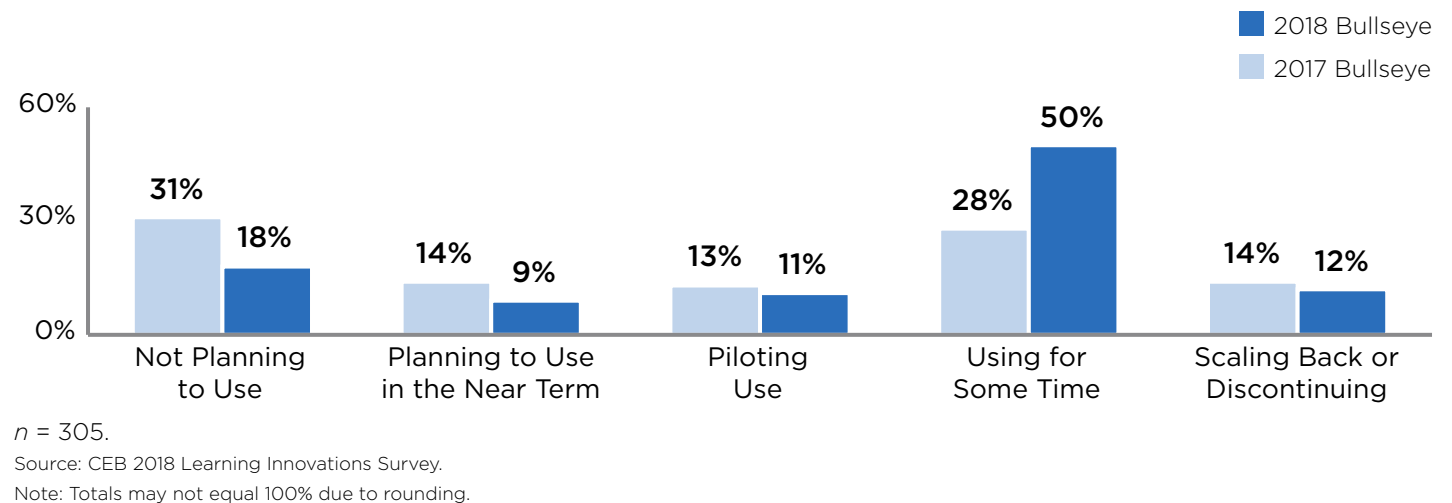
Although L&D professionals are skeptical about its potential impact, they are planning to increase investment in custom user interfaces.

- The percentage of L&D professionals who feel that custom user interfaces have a positive impact on employee performance has fallen four percentage points since last year.

- But L&D professionals will continue investing the most in this feature in the next two years.

- Continued investment has caused adoption to steadily rise, and 50% of L&D professionals say they have been using custom user interfaces for some time.

CUSTOM USER INTERFACE: SKEPTICAL BUT INVESTING

ADOPTION	CURRENT IMPACT	FUTURE INVESTMENT
70% of L&D professionals are using or planning to use custom user interfaces. *n* = 305. Source: CEB 2018 Learning Innovations Survey.	**40%** of L&D professionals say custom user interfaces have a high impact on employee performance. *n* = 305. Source: CEB 2018 Learning Innovations Survey.	**37%** of L&D professionals are planning to increase investment in custom user interfaces in the next two years. *n* = 305. Source: CEB 2018 Learning Innovations Survey.

Extent of Deployment of Custom User Interface
Percentage of L&D Professionals

Legend:
- 2018 Bullseye
- 2017 Bullseye

Chart data:
Category	2017 Bullseye	2018 Bullseye
Not Planning to Use	31%	18%
Planning to Use in the Near Term	14%	9%
Piloting Use	13%	11%
Using for Some Time	28%	50%
Scaling Back or Discontinuing	14%	12%

n = 305.
Source: CEB 2018 Learning Innovations Survey.
Note: Totals may not equal 100% due to rounding.

- Target realized that it needed to organize information around how employees talk about it to make the experience feel personalized for learners.

- To ensure a positive first experience, Target visually simplifies the different types of resources in each platform section and presents only the most job-relevant information.

PERSONALIZE A SIMPLE "FRONT DOOR"

Personalized Learn@Target View
Illustrative

Learner-Centric Organization Principles

1. Tailor Learner View
Curate what employees see by identifying the filters that matter to employees' perception of personalization. For Target, this is location, role responsibilities and tasks, leadership level, and other relevant topics.

2. Frame Around Learner Voice
Use employee voice to enable employees "see themselves" in the offerings.

3. Simplify the Learner Visual
Inspire employee action with engaging and easy-to-consume visuals.
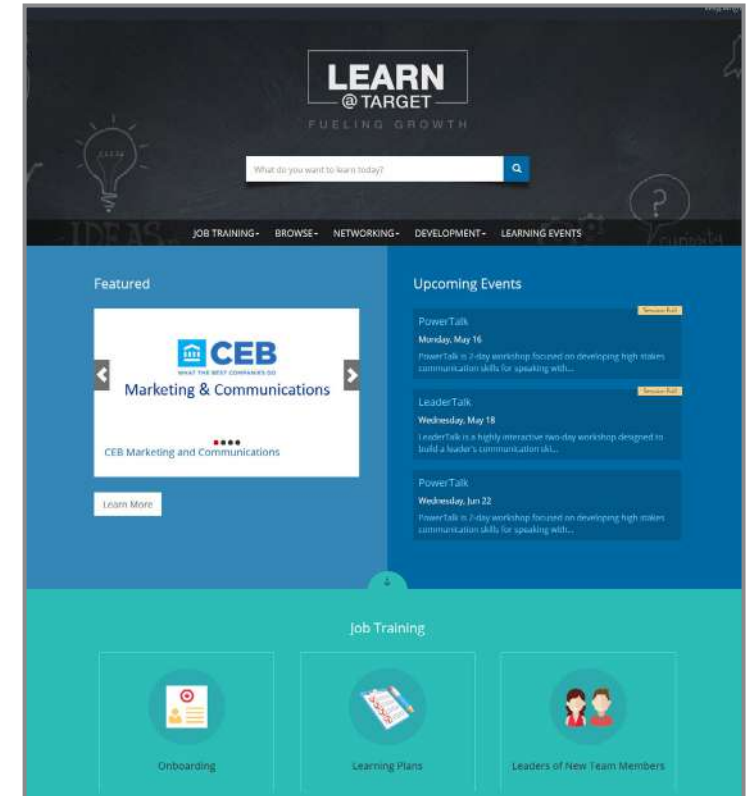
Source: Target Corporation; CEB analysis.

Personalize context around learners' roles and preferences using Target's "Front Door" approach.
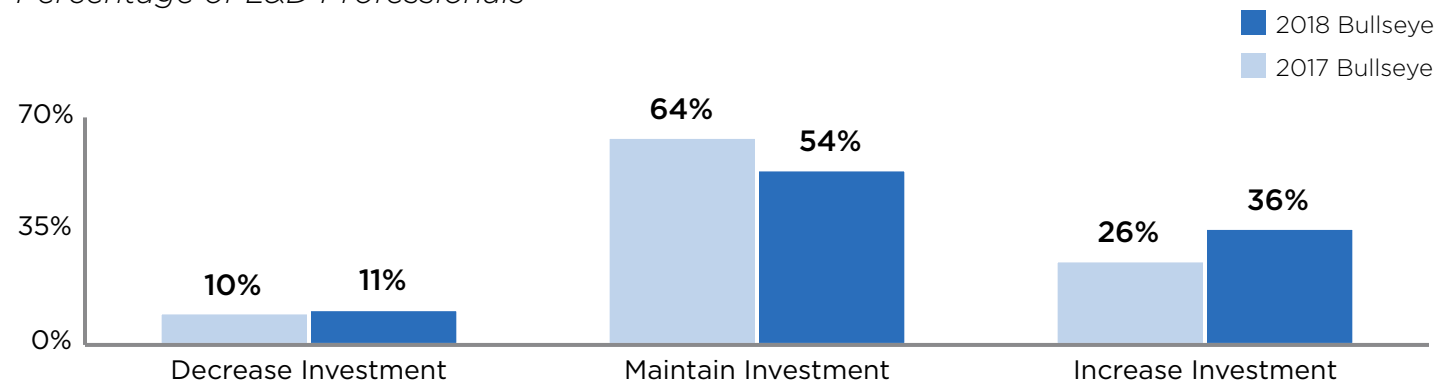
- L&D professionals believe that features enabling learning evaluation have the highest positive impact on employee performance.

- The percentage of L&D professionals who plan to increase investment in LMS features enabling learning evaluation rose by 10 points last year.

LEARNING EVALUATION: IMPACT DRIVING INVESTMENT

ADOPTION	CURRENT IMPACT	FUTURE INVESTMENT

74% of L&D professionals are using or planning to use LMS features enabling learning evaluation.

n = 305.
Source: CEB 2018 Learning Innovations Survey.

47% of L&D professionals say LMS features enabling learning evaluation have a high impact on employee performance.

n = 305.
Source: CEB 2018 Learning Innovations Survey.

36% of L&D professionals are planning to increase investment in LMS features enabling learning evaluation in the next two years.

n = 305.
Source: CEB 2018 Learning Innovations Survey.

Expected Level of Investment in LMS Features Enabling Learning Evaluation Over the Next Two Years
Percentage of L&D Professionals

■ 2018 Bullseye
■ 2017 Bullseye

	Decrease Investment	Maintain Investment	Increase Investment
2017 Bullseye	10%	64%	26%
2018 Bullseye	11%	54%	36%

n = 305.
Source: CEB 2018 Learning Innovations Survey.
Note: Totals may not equal 100% due to rounding.

- Target tracks the most common search terms and those that don't provide any results.

- Based on empty search terms and general feedback, Target identifies and determines the best way to close experience gaps.

TRACK EXPERIENCE GAPS, NOT JUST CONSUMPTION

Track Experience Gaps, Not Just Consumption, to Keep Learning Experience Novel

	Total Search Queries 2153

Top Search Terms With No Results

Rank	Search Term	# of Times Searched	% of Total
1	javascript	21	0.98
2	powertalk	19	0.88
3	dc0011	17	0.79
4	post incident	16	0.74
5	LT0006	10	0.46
6	Asserting yourself	6	0.28
7	st1401	5	0.23
8	post-incident	4	0.19
9	Price Changes Learning Activity	4	0.19
10	revocation form	4	0.19

View All   Export All

L&D Experience Gap Identification Questions

Answer the following questions to inform planning for ongoing updates.

- What are the currently unsupported search terms and information employees are looking for?

- How can we fill these information gaps?

- Do we already have the necessary information? Is the content already within a solution but hard to find?
  - **If Yes:** What do we need to change? How can we make it easier to find?
  - **If No:** Who can create this? Is it just a search within a specific business unit?

- What else are employees looking for?

- Are these the most critical changes we need to make?

LEARN@TARGET APRIL UPDATE

- **Focus On:** IT support
- **Adding/Subtracting:** Add external courses
- **Purpose:** Build JavaScript programming capabilities

Source: Target Corporation; CEB analysis.

LMS FEATURE RANKINGS

Sorting

⬇ Sorted By   ⬇ Click to Sort

Adoption Level

○ Experimenting   ● Adopting   ● Embedded

Current Impact

Low   Medium   High

Future Investment

● Low   ● Medium   ● High

n = 305.

Source: CEB 2018 Learning Innovations Survey.

Note: Degree of adoption is measured by extent and nature of deployment across organizations. Current level of impact is based on level of value delivered by the learning and development process. Future outlook is based on projected level of investment in the next two years.

ROADMAP

Learning
Channels ▶ Learning
Methods ▶ LMS Features ▶ **Appendix**

RESOURCES HIGHLIGHTED IN THIS REPORT

Resources	Description
L&D Innovations Bullseye Builder	Access this online interactive tool to build a custom bullseye for your organization, and benchmark it with CEB's global benchmarks.
Learning Technology Center	Explore an inventory of over 140 resources tagged by individual technologies and innovations.
Learning Technology Strategy Playbook	Use this guide to build your learning technology strategy in 11 simple steps.
CEB Ignition™ Guide to Selecting an L&D Vendor	Create a request for proposal, develop standard vendor evaluation criteria, negotiate and finalize the vendor contract, and prepare the selected vendor for effective implementation.
William Hill's Change-Adaptive HIPO Development Program Design	Redesign your classroom courses using William Hill's iterative and learner co-authored approach to HIPO development.
Xerox Authentic Workforce Knowledge Sharing	Boost the impact of online video learning by exploring how Xerox enabled learners to create and share unscripted, relevant, and actionable videos.
Microsoft India's App-Enabled Personalized Leader Development And Transformation	Learn how Microsoft personalized their learning portals by implementing learning paths that are also private.
IBM's Just-In-Time Coaching and Feedback Support	Find out how IBM used artificial intelligence to remind learners when to give feedback, how to give it, and analyze text to determine emotion.
Swiss Re: Strategic Dilemma Simulations	Implement Swiss Re's strategic dilemma simulations and make your in-person simulations future-focused, unpredictable, and risk oriented.
BP's Leadership App	Enable managers to build better team environments using BP's approach to measuring and acting on team motivators.
Target's Learner-Centric Platform Design	Personalize context around learners' roles and preferences, and evaluate what content they are and aren't acccessing using Target's "Front Door" approach.

Source: CEB analysis.

L&D'S CHALLENGES USING LEARNING TECHNOLOGIES

We asked L&D professionals what they found challenging about selecting, implementing, and using learning technologies.

1. Challenges in Selecting the Right Learning Technology		2. Challenges in Implementing a New Learning Technology		3. Challenges While Using a Learning Technology	
Identifying which technology learners need	**51%**	Teaching how to use the learning technology	**52%**	Increasing engagement with the learning technology	**51%**
Finding the budget to invest in the learning technology	**49%**	Integrating existing technology with the learning technology	**50%**	Calculating the learning technology investment ROI	**46%**
Selecting the right vendor	**46%**	Promoting the learning technology to learners	**46%**	Analyzing the appropriate employee metrics related to the learning technology	**45%**
Determining the ROI of each learning technology	**44%**	Training L&D staff to use the learning technology	**42%**	Receiving appropriate technical support from internal functions	**44%**
Deciding whether to build each learning technology in-house or outsource to a vendor	**44%**	Designing the learning technology	**37%**	Identifying the correct employee metrics related to the learning technology	**37%**
Gaining business buy-in for the learning technology	**33%**	Communicating with vendors	**34%**	Receiving appropriate technical support from the vendor	**35%**
Negotiating a contract with the vendor	**27%**	Integrating any vendor products into the LMS	**32%**	Getting regular reports on numbers of people using the technology	**32%**

n = 305.

Source: CEB 2018 Learning Innovations Survey.

Note: Respondents were asked to select their top three challenges during each phase.

GLOSSARY OF TERMS

Learning Channels	Definition
Blogs, Microblogs, and Wikis	Blogs, microblogs, and Wikis are a type of website that encourages employees to interact by sharing comments, questions, opinions, and content, such as articles, graphics, and videos, on a particular topic.
Chatbots	Textual communication software that is able to simulate human communication, powered by AI
Classroom-Based Learning	A face-to-face, instructor-led learning event with all learners present in the same location and a defined beginning and end
E-Learning Modules	The delivery of learning content via a computer or similar device; the content (packaged as a module) has a set beginning and end, typically mixes audio and visual information, and allows some interaction with the content (e.g., quiz).
Enterprise Collaboration Environments (e.g., Sharepoint, Huddle)	Online platforms that enable closed groups of employees to collaborate on content and projects; features typically include document sharing and management, task assignment, and project status tracking.
Enterprise Social Networks	Social networking websites facilitate the finding and sharing of information via a virtual platform.
Instant Messaging	Instant messaging offers real-time text transmission over the Internet.
Learning Portal	An online portal containing content that can be consumed by the user how and when they want
Massive Open Online Courses	Free, web-based distance learning programs designed for the participation of large numbers of geographically dispersed learners
Mobile Learning (M-learning)	The use and distribution of learning content that users can access and typically interact with via portable devices (e.g., smartphones, tablets)
Online Video Learning (e.g., Lynda.com, YouTube)	The use and distribution of learning content through online videos
Virtual Learning	An instructor-led learning event with a defined beginning and end; learners connect from different locations

Source: CEB analysis.

GLOSSARY OF TERMS (CONTINUED)

Learning Channels	Definition
Virtual Reality	A computer-generated environment, facilitated by a headset that separates users from the physical world around them (e.g., Gear VR, Oculus Rift)
Virtual Worlds	An online platform that creates a simulated space, allowing employees to interact directly with one another via the use of avatars (an icon or figure representing the employee)

Source: CEB analysis.

GLOSSARY OF TERMS (CONTINUED)

Learning Methods	Definition
Action Learning	A process whereby employees are assigned to work together in groups on a real business problem; employees derive learning from their actual actions and by reflecting on those actions.
Applying Neuroscience Principles	Using principles from neuroscience to increase effectiveness of learning and leadership development
Artificial Intelligence	The development of machine intelligence that can perform tasks normally available only to the human brain.
Augmented Reality	Supplementing the real-world environment by superimposing digital content through the use of technology such as Google Glasses or other handheld devices
Communities of Practice	The creation of a community of individuals for the purpose of collaborating on a specific subject, issue, or set of issues, typically facilitated via virtual platform
External Development Networks	Cohorts of peers from a collection of organizations who exchange ideas and best practices and may engage in problem-solving exercises together
Gamification	The application of elements of game playing (e.g., point scoring, competition with others, rules of play) to learning interventions
Including Learners from Partner Organizations	Involving employees from external organizations as participants in your development programs; the external participants are learners and not teachers or presenters. The objective is to help your employees build relationships with peers at partner organizations and develop their understanding of your organization's larger ecosystem.
In-Person Simulations	Activities, such as in-person role plays, scenario-based games, and case studies that allow employees to practice and develop skills
Manager-Led Coaching	An ongoing series of job-related interactions, driven by an employee's manager, designed to improve the employee's short-term and long-term performance

Source: CEB analysis.

GLOSSARY OF TERMS (CONTINUED)

Learning Methods	Definition
Mentoring	A series of interactions between an employee and a more tenured (and typically more senior) colleague, focused on providing advice and guidance relevant to the employee's long-term development and career decisions
Network Learning	Learning that employees derive from the work-related relationships and activities they engage in with other people and that is reciprocal.
On-the-Job Learning	Providing tools and frameworks to help employees learn more effectively from daily work; tools may include guidance on identifying good learning opportunities, how to reflect on learning experiences, etc.
Peer-Based Coaching	An ongoing series of job-related interactions between an employee and his or her peer, designed to improve the employee's short-term and long-term performance
Targeting Employee Mind-Set	Applying research on the employee mind-set to increase effectiveness of learning and leadership development
Team-Based Development Action Plans	Creating development plans that build capabilities across a team rather than focus solely on individual development needs
Technology-Enabled Simulations	Role plays, games, and case studies delivered on a virtual platform that allows employees to practice and develop skills
User-Created Content	The adoption and promotion of content, information, best practices, and success stories from learners or users

Source: CEB analysis.

GLOSSARY OF TERMS (CONTINUED)

LMS Features	Definition
Certification Management	The LMS has the capacity to track and report corporate education units to document continued accredited professional development.
Compliant with Third-Party Tools	The LMS accepts a wide variety of applications from outside vendors, which allows for integration with other vendor systems or products.
Custom User Interface	The LMS allows customization of interactive components based on learners' personal preferences.
Enables Learning Evaluation	The LMS provides tools for designing, modifying, and launching various evaluations for development solutions.
Enables Learner-Created Content	The LMS includes the capacity for content to be created and uploaded by employees.
Gamification Features	The LMS enables gamification features, such as leaderboards and badging systems. (See also Gamification.)
Integration with the Performance Management System	The LMS incorporates the organization's performance management system.
Management of Informal Learning and Communities of Practice	The LMS enables informal and social learning through communities of practice. (See also Communities of Practice.)
Predictive Learning Analytics	The LMS provides data that can be used to predict learning outcomes.
Provides Mobile Access	Content is accessible via a portable device (e.g., smartphone, tablet).
Pushing Content Based on Learner Profiles	The LMS aligns learning with a learner's specific needs—based on a personalized plan or profile—and proactively pushes content to the learner.

Source: CEB analysis.

GLOSSARY OF TERMS (CONTINUED)

LMS Features	Definition
Reports Integrating Real-Time Data	Reports using real-time data can be generated.
Shares Content Outside Organizational Firewall	The LMS allows content to be shared outside the organizational firewall (e.g., with partner organizations such as customers, subcontractors, and suppliers).
Tin Can/xAPI-Enabled	The LMS supports Tin Can/xAPI, a specification for learning technology that helps collect data about a broad range of learning experiences, including those outside the LMS.

Source: CEB analysis.