

RESEARCH ARTICLE

Learning in the Flow of Work Solutions: Market Primer

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Overview

Shifts in the world of work and increasing worker expectations are driving organizations to approach learning in a more integrated way. For many organizations, searching for tools in the learning solutions market that can support development initiatives can be overwhelming. The increased applicability and utilization of solutions outside of the traditional learning market adds another layer of complexity to this task. Buyers are often focused on how to build the perfect learning technology stack, but the more foundational question is how best to leverage technology to support an organization's learning strategy.

As buyers seek to gain knowledge about the types of learning solutions available, it's helpful to understand today's market, the key activities that enable learning in the flow of work, and ways to assess the solutions that are supporting the convergence of learning and work.

In This Article

- ✓ The current state of the learning solutions market
- ✓ Key activities to enable learning in the flow of work
- ✓ Solutions with capabilities that support learning in the flow of work

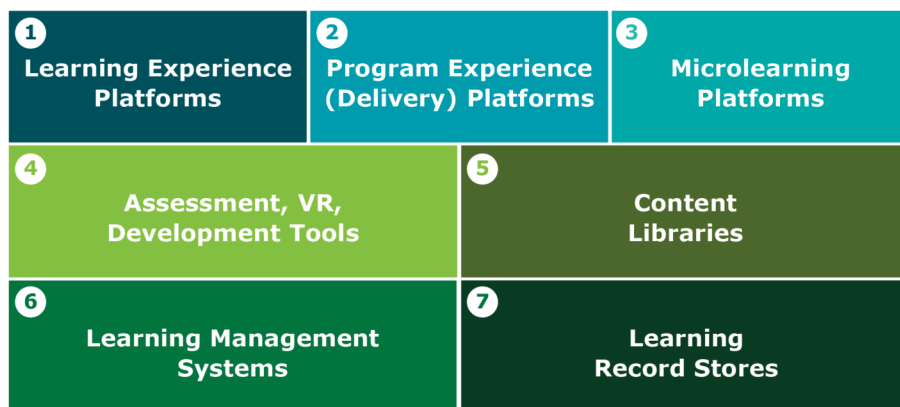




The Evolving Learning Technology Market

Changing the way people learn has become a key priority for organizations. According to our latest Global Human Capital Trends Report, 86 percent of respondents indicated that learning is important or very important to their organizations¹, while only 11 percent of respondents indicated their learning culture as excellent². The organizations that can address this gap have an opportunity to get ahead of the game, but they shouldn't expect to tackle it alone. Solutions providers are integral partners in the innovation and transformation process, especially for organizations that may not have as much experience with evolving their learning function.

Organizations are looking for solutions that support learners with what they want and need to know to drive performance now and in future roles. Learning teams have typically been focused on increasing the amount of content available to their workforce, which is only a piece of the puzzle. To make content available, organizations have frequently used learning tools in a way that provides the information and experiences outside of where the work is being done. This compartmentalization of learning and work is no longer acceptable. Learning technology has a major support role to play in transforming learning organizations and delivering meaningful content to support workers' development without distancing them from their workflows and environments.³

Figure 1: Traditional Learning Solutions Classification By Category

Source: Bersin, Deloitte Consulting LLP, 2019.

The traditional view of the learning technology market classified solutions by capability (see Figure 1). For example, solutions might organize content (e.g., Learning Record Stores), manage and measure the delivery of learning content (e.g., Learning Management Systems), or deliver a personalized learning experience (e.g., Learning Experience Platforms⁴). These were generally considered separate domains, but as solution providers began developing capabilities across categories, these neatly defined classifications became muddled—illustrated by the explosion of experience-focused features across solution types. While creating a high-quality experience for learners should be a priority for all organizations, deploying multiple tools without an integrated strategy has the potential to create functional overlap between systems, which can result in overwhelming learners confronted with too many options.

In addition to the blending of capabilities, we are also seeing increased adaptation and adoption of tools outside of the traditional learning market, especially in platforms that workers are already using as part of their daily work. These systems of work present a compelling opportunity to deliver learning content without introducing additional systems and interfaces. These platforms must be understood as part of the broader learning context, but they also introduce additional complexity into the market. Solution buyers are looking to provide frequent, on-demand access to the learning content their workforce wants coupled with an intuitive, user-focused experience. At the same time, they are having difficulty clarifying what partners and capabilities are needed to enable these objectives. This shift in priorities demands a new framework for understanding and analyzing the market.

KEY POINT: Learning technology can support transformation by delivering the content and insights workers need to support their development without taking them away from their work environment.

Enabling Learning in the Flow of Work

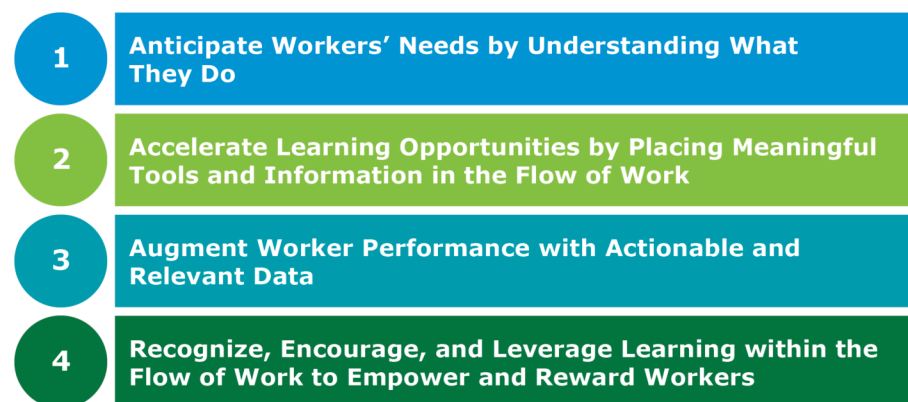
A learning organization performs at a higher level because of its ability to adapt to its environment. One of the best ways for an organization to evolve and adapt is to help the workforce do the same thing. The

responsibility for driving this evolution can't sit solely with the learning function, as a key characteristic of a learning organization is that the entire organization shares responsibility for giving workers the support they need to do their jobs effectively and develop their skills.

There are many different factors that feed into creating the conditions that help an organization to adapt. And while technology can support this, it isn't the be-all and end-all—it can only help contribute to the creation of a continuous learning environment. Understanding what workers need to get the work done is a critical first step in the process to serve a larger goal of better awareness and empathy with the workers themselves. This move from command and control of training to stewarding experiences will involve significant shifts from the learning team in how they work and the technology they use.

Our research⁵ shows that high-performing organizations steward experiences by making content relevant, personalized, and available to learners when they need it. That moment of need might be when workers are getting ready to complete a task or as they are in the process of doing the work. Learning tends to come naturally with experience and from direct work. The inherent connection between learning and work can become even more meaningful as companies embrace continuous development to keep up with individual and organizational demands for greater learning opportunities. High-performing organizations⁶ embed learning in the flow of work⁷ through a combination of tools and approaches that enhance this connection (see Figure 2).

Figure 2: Four Leading Practices that High-Performing Organizations Implement to Embed Learning in the Flow of Work



Source: Bersin, Deloitte Consulting LLP, 2019.

But what is the value of this new approach? Our High-Impact Learning Organization research⁸ and Learning in the Flow of Work research⁹ show that organizations that implement learning in the flow of work regularly experience greater business outcomes and an increased talent experience. Highly mature organizations realize 107 percent higher three-year average earnings per share than less mature organizations as well as a 59 percent higher three-year average share price.¹⁰ Given the direct

connection between learning and organizational performance, the methods that high-performing organizations use to put learning in the flow of work are the foundation for our new approach to the learning technology landscape. Our study focuses on solutions that offer strategic support by capitalizing on the learning opportunities that occur throughout a worker’s day. This framework helps organizations evaluate their learning technology investments to bring learning into the flow of work itself and enable better business outcomes.

KEY POINT: Solutions that enable learning in the flow of work capitalize on the learning opportunities that occur throughout a worker’s day.

Ways Technology Is Used to Bring Learning into the Flow of Work

Drawing from our High-Impact Learning Organization research, we’ve identified four methods through which technology can enable learning into the flow of work (see Figure 3). Described in detail in the Learning in the Flow of Work series, each method is focused on better enabling performance improvement and continuous development.¹¹

Figure 3: Four Methods that Bring Learning Technology into the Flow of Work

1	Anticipate Workers’ Needs by Understanding What They Do	
2	Accelerate Learning Opportunities by Placing Meaningful Tools and Information in the Flow of Work	Incorporate Tools into the Flow of Work
		Minimize Psychological and Physical Distance
3	Augment Worker Performance with Actionable and Relevant Data	Augment Worker Performance with Actionable and Relevant Data
4	Recognize, Encourage, and Leverage Learning within the Flow of Work to Empower and Reward Workers	Capture and Surface Learning Activity to Empower and Reward Learners

Source: Bersin, Deloitte Consulting LLP, 2019.

Incorporate Tools into the Flow of Work

Part of enabling learning in the flow of work is the direct connection between learning and work activities. Technology can play a role by creating learning opportunities where the work is being done—in a physical location like an office or in a digital environment where work tasks are completed. An analog example of this concept is a how-to guide taped next to a copy machine for reference. A technology-enabled example

might include a QR code that a user could scan to access a video explanation of how to troubleshoot common issues with the machine. This method is associated with the concept of Guided Adaptation, or the extent to which organizations are providing workers with the information and guidance necessary for continuous performance improvement.¹² When learning content is embedded directly into the tools workers are already using, organizations can increase visibility into learning activity and outcomes and help prevent workers from searching in other systems for the information they need.

Minimize Psychological and Physical Distance

By putting information and tools directly in the systems where work is being done, organizations eliminate the physical distance between work and learning. But sometimes, learning on the job is easier when individuals are not under pressure from their actual work environment. Technology can help remove some of the pressure without completely taking the worker out of the environment by simulating the environment through virtual learning. This might involve making learning content available digitally for reference during a job task or using virtual reality (VR) to replicate a worker's individual activities or environment. By removing some of the pressure of the work environment, technology minimizes the risks of failure. This helps bridge the gap between learning and doing as workers can integrate the experience into the flow of work and apply as much on-the-job environment knowledge as possible.

Augment Worker Performance with Actionable and Relevant Data

High-performing organizations monitor and frequently share qualitative data (e.g., feedback from peers and managers) and quantitative data to workers and teams. These organizations take their analyses beyond data about learning activities or relevant performance information available across HR systems to examining how to help learners understand their opportunities for growth. As discussed in our People Analytics Solutions Market Primer, democratizing data access through technology helps workers and organizations perform better.¹³ Data should be delivered in a way that is meaningful for its intended audience and should give the learner and manager insight into how learning is impacting business outcomes. Technology solutions can take this even further by not only surfacing this data but also translating it in an accessible way for learners, managers, and teams to leverage as needed within the course of their work.

Capture and Surface Learning Activity to Empower and Reward Learners

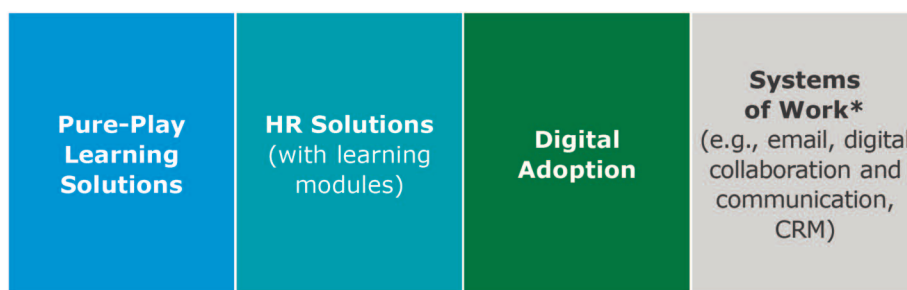
High-performing organizations recognize that learning can happen at any time and celebrate continuous growth. Workers feel empowered when the organization supports traditional and nontraditional learning experiences that allow them to create self-defined development journeys.¹⁴ Learning solutions enhance the experience by capturing and surfacing as much

learning activity as possible to help create ripe conditions for a learning culture.

Solutions That Support Learning in the Flow of Work

As the lines between learning and work continue to blur, organizations are left to figure out how best to deliver relevant content to their workforce. While learning can happen at any time, most organizations don't have a way to manage that experience and provide visibility into learning activity across traditional and nontraditional environments. We see organizations tackling this issue by incorporating solutions both inside and outside of the traditional learning technology market. This is not a question of one or the other, as many learning solutions are developing partnerships and integrations with workplace tools, and the more general platforms don't typically have a learning-specific feature or focus. As companies look to leverage other entry points to introduce learning into the individual's workflow, HR teams need to understand how these platforms might interact with and augment their existing ecosystems. Our learning solutions study focused on three broad market areas that play a significant role in supporting learning in the flow of work (see Figure 4).

Figure 4: Three Solution Areas that Support Learning in the Flow of Work



**Not included in the survey scope*

Source: Bersin, Deloitte Consulting LLP, 2019.

Pure-Play Learning Solutions

Pure-play learning solutions are dedicated to one or more of the traditional learning categories and are designed specifically for learning-focused activities. Providers in this space continue to develop the experience-focused capabilities that are necessary to support learning in the flow of work. Solutions in this category include traditional technologies such as Learning Management Systems (LMSs) and Learning Experience Platforms (LXPs). They generally provide a dedicated learner interface for engaging with content. Another subset of solutions in this category incorporates performance enablement alongside other learning activities. Learning is still the primary point of entry for these tools, but the

secondary focus on surfacing relevant performance information further supports worker development.

HR Technology Solutions

Learning in the flow of work capabilities are also available within Talent Management Suites or Human Capital Management Suites. This category includes solution providers that offer capabilities outside of the learning space (such as talent acquisition, performance management, and rewards) in addition to a dedicated learning module or set of learning-focused capabilities. While these platforms typically don't have the niche focus of the pure-play providers, there is an opportunity to leverage centralized data access for increased visibility across modules such as performance management and worker feedback. These suite-style platforms typically offer an advantage in providing access to operational data drawn across various HR processes.

Digital Adoption Solutions

Not traditionally considered learning tools, solutions in this category are focused on providing workers with real-time access to information designed to accelerate their productivity. Digital adoption tools provide in-app guidance and training to help users get up to speed with a new solution or inform them of system changes and updates. An example of this is a notification within a performance management tool that introduces enhanced functionality, including the option to take an automated walkthrough of the updated process. These solutions also offer back-end visibility into utilization patterns and other data to provide insight into learning needs across the workforce. Digital adoption tools provide easily accessible, self-service information as needed with strong back-end analytics to enable better understanding of worker needs.

Other Solutions That Support Learning in the Flow of Work: Systems of Work

The way that people work can have an impact on the way that they learn. The increased adoption of systems of work as primary or secondary learning environments is a direct result of this. Systems of work are the tools that workers use as part of their day-to-day job activities. While this could involve any number of platforms and technologies, one of the biggest areas of opportunity is the incorporation of workplace communication and collaboration tools. Designed for internal communication as an alternative to email, these systems serve as a centralized hub for collaboration within and across teams. With the ability to post content, comment, share files, and more, workers are spending a greater portion of their day interacting within these platforms. A 2019 study on work-life balance found that knowledge workers are checking communication tools an average of once every six minutes.¹⁵

While not included in this market landscape, systems of work still have a key role in an organization's learning ecosystem and should be considered as part of the wider learning strategy. The amount of time a worker spends

using these tools makes them an attractive option for housing content whenever possible, as it eliminates the need to direct learners to a new system or train them on an unfamiliar interface. There is a large and growing collection of plug-ins and apps designed exclusively to operate within these tools, and solution providers with learning-focused capabilities are capitalizing on this opportunity by designing features to work within these environments. This reinforces their value as a primary worker interface, creating a snowball effect for both traffic and engagement.

Conclusion

As work environments are rapidly becoming more digitized, many organizations are prioritizing development and reskilling and are looking to change their approach to learning: 84 percent of organizations are planning to increase reskilling program investment.¹⁶ This change in approach presents a significant challenge for learning functions that have been comfortable focusing on creating and cultivating content without considering the shifting contexts and development challenges their workforces are confronting. However, it can create significant opportunity for organizations that can adapt to be at the forefront of this movement and execute a differentiated learning strategy. Although technology is only one piece of the larger organizational learning framework, it has an integral part to play in this evolution by allowing workers to more easily capitalize on the opportunities for learning that they come across throughout the course of their day. By enabling learning in the flow of work, learning organizations are better able to provide their workforce with the resources and knowledge that they want at the time and place that it is most relevant, enabling learners to better manage their personal development journey.



Key Takeaways

- High-performing organizations recognize that they need to evolve how people work and learn to meet the needs of their workforce and bring learning into the flow of work.
- Technology doesn't place learning into the flow of work, but it can enable the methods and practices necessary to do so.
- There are four technology-enabled methods critical to learning in the flow of work: incorporating tools into the flow of work, minimizing psychological and physical distance, augmenting worker performance with actionable and relevant data, and empowering and rewarding learners.
- Three broad market areas support learning in the flow of work: pure-play learning, HR technology suites, and digital adoption.
- By evaluating and implementing solutions inside and outside of the traditional learning space, learning teams will be better equipped to support a holistic learning environment.

Endnotes

1. [*2019 Global Human Capital Trends: Leading the social enterprise—Reinvent with a human focus*](#), Deloitte Consulting LLP and Deloitte Insights, 2019.
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5. High-Impact Learning Organization research, Bersin, Deloitte Consulting, LLP, 2017.
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7. [*Four Practices to Embed Learning in the Flow of Work*](#), Bersin, Deloitte Consulting LLP / Julie Hiipakka and Chelsey Taylor, 2019.
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15. [*"The State of Work Life Balance in 2019: What we learned from studying 185 million hours of working time,"*](#) blog.RescueTime.com / Jory MacKay, January 24, 2019.
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