

LEARNING TRENDS INDIA 2020



**Reimagining learning
for a hybrid workplace**

A People Matters & Skillsoft Research Study

ABOUT PEOPLE MATTERS

With over 350,000 users, People Matters is Asia's largest and the world's fastest growing digital community platform focused on the space of people and work.

ABOUT SKILLSOFT

Skillsoft delivers online learning, training, and talent solutions to help organizations unleash their edge. Leveraging immersive, engaging content, Skillsoft enables organizations to unlock the potential in their best assets – their people – and build teams with the skills they need for success. Empowering 36 million learners and counting, Skillsoft democratizes learning through an intelligent learning experience and a customized, learner-centric approach to skills development with resources for Leadership Development, Business Skills, Technology & Development, Digital Transformation, and Compliance.

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FOREWORD

As companies were looking at their business continuity plans in the backdrop of COVID 19 induced disruption, there has been a shift towards building and scaling up digital operations across all sectors and jobs. When the world of work came to a complete standstill due to lockdowns in different countries, it gave businesses an opportunity to re-look at their strategies.

While traditional learning prepares people for different aspects of work, navigating digital tools can play a remarkable role in boosting a company's learning strategies. This research has validated our hypothesis – that most organizations are willing to understand their learning journeys with more data and insight.

Whether it is by experimenting with new methodologies, personalizing learning journeys and measuring learning effectiveness, the innovative digital tools are going to play a significant role in boosting the business.

We're delighted to discover that there is a growing recognition of the importance of informal learning. As a remote working culture took over, employees too have found new resources to boost their own skills. The fundamental challenge with learning continues to remain building a lifelong habit of learning. And that calls for a holistic approach to learning and an opportunity for L&D teams to upgrade their practices.

We hope you will use the report to not just gain a better understanding of the landscape of the skilling in India, but also to put into practice some of the key action items that are outlined in the study. These suggestions are aimed at accelerating your learning strategy. We would like to thank all the participants who gave us their valuable time and expertise.



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INTRODUCTION

In the last several months, companies had to make a number of pivots in order to deal with the pandemic induced disruption. Among them is the shift in workplace learning that has been one of the most significant ones.

Not only did learning take on a preeminent role in the remote working world, it also forced new learning paradigms quickly. From identifying digital modes of learning, tracking and supporting employee learning, to innovating with formats and courses remotely.

Companies that had already made the shift towards a digital first environment were able to rise to the challenge quickly, while companies that were unprepared, had to lay the groundwork to build and scale up their digital learning strategies.

As employees dedicated more time towards learning as they were working from home, employers were also looking at equipping their leaders and managers with the skills needed to navigate the new world of work in a digital first world.

The research report on “Learning Trends India 2020” by People Matters and Skillsoft was designed to understand the shifts in learning priorities. The focus areas for the research was on understanding the strategic priorities of the L&D function, the role of informal learning or non-structured learning, the different modes of learning, trends in budget allocation and key impact measures. A total of 120 different companies participated in the research study.

As the pandemic forced companies to relook at the sustainability of their business operations, re-drawing the roadmap to the future in terms of skills became a critical focus area. While a number of companies would like to track aspects like non structured learning as part of their learning strategy, most don't have the tools to do it.

The current disruption has pushed companies to think about the impact and sustainability of digital learning. It has also forced L&D teams to think about what various ways they can support, measure progress and offer alternatives to help their employees build their skills. Within business verticals, it has also meant a shift in job responsibilities, customer outlook and leadership capability.

**The future of work is no longer distant,
it is here, now.**

KEY FINDINGS

TREND 1: “Future-focused” skills and capabilities are on top of the priority list

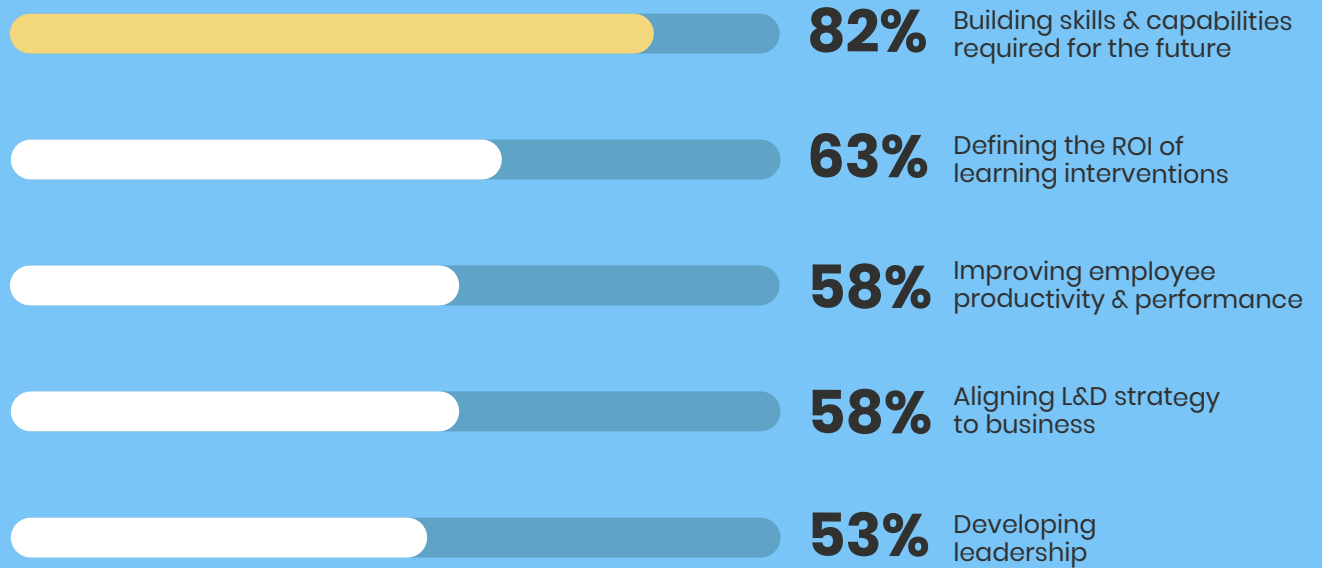


At a time when businesses are mainly focused on business continuity, 8 out of 10 L&D leaders say that their main priority over the next 12 to 18 months, is to focus on building skills and capabilities required for the future. A number of companies are already charting the path towards the future by focusing heavily on reorganizing organizational priorities, workforce strategies. By mapping skill requirements required to adapt to a new normal and a hybrid future, where a combination of remote working and office goers will change the workplace.

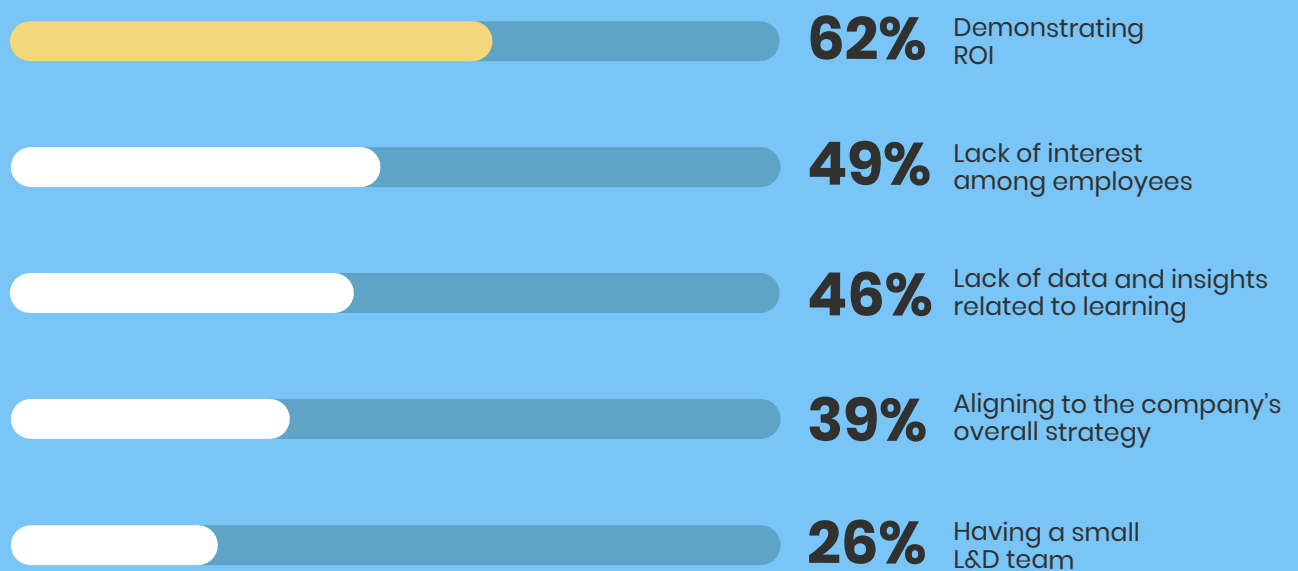
Defining the return on investment on learning has been identified as both — a key priority area and a key challenge area by over 60 percent of the respondents. It is a critical focus area, as many companies were forced to re-look at their own operating expenses and business continuity plans with tightened budgets.

There's also an increased focus on boosting employee morale and participation, as a number conversations on well-being put the physical and mental health of employees on the spotlight. Lack of interest among employees was rated as a challenge area by 49 percent of the respondents. And improving employee productivity and performance was rated at a key priority area by 58 percent of the participants.

5 main priorities for the L&D function



Key L&D Challenges

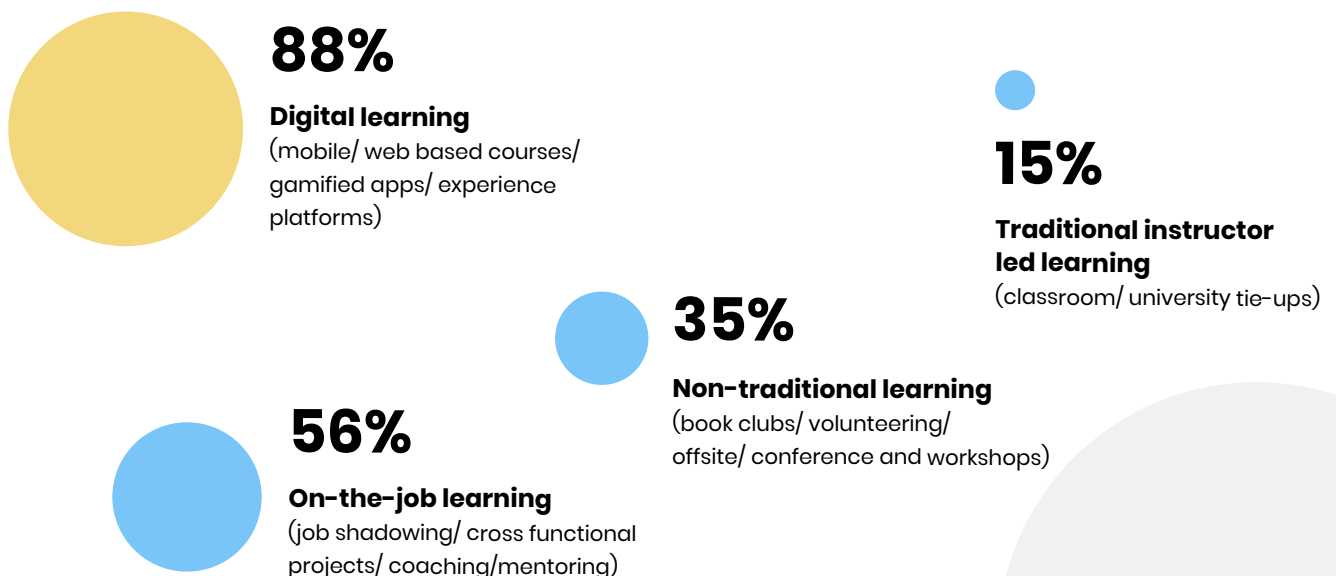


TREND 2:

Digital learning is the most preferred 'aspirational' mode of learning

88 percent of the HR and L&D leaders listed digital learning as the top most option for aspirational mode of learning. Digital learning tools have found renewed attention following the global pandemic and the ensuing remote working model that has permanently shifted the world of work. Companies that previously employed classroom training have had to shift towards digital courses that can be completed over the mobile or web. As the avenues of traditional learning have been ruptured, only 15 percent of the respondents saw it as an aspirational opportunity. On-the-job learning opportunities have risen in importance. About 56 percent of the respondents said that they would like to add coaching, mentoring, and cross functional projects to their learning strategy. During this time, companies are also identifying ways of supporting their employees to be supported with coaching conversations online.

Key L&D Challenges



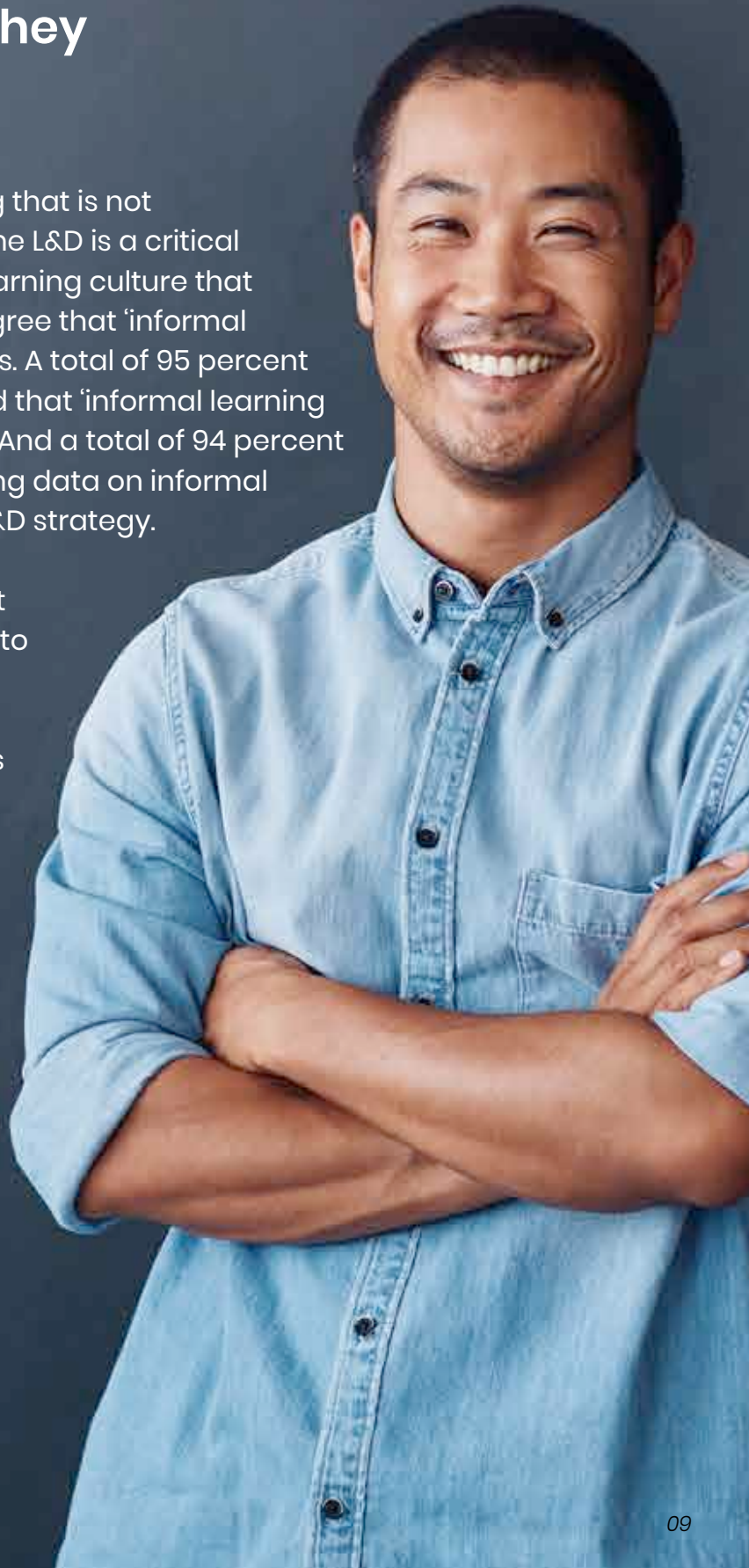
TREND 3:

95 percent of the respondents say that ‘informal learning’ is as important as formal learning, 58 percent say that they don’t track it.

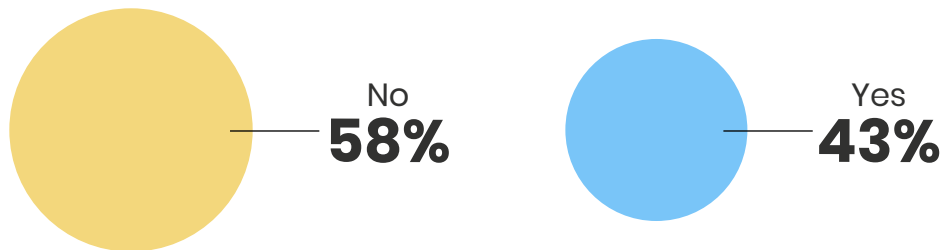
Informal or non-structured learning that is not mandated by the organization or the L&D is a critical factor in assessing a continuous learning culture that builds curiosity. Most companies agree that ‘informal learning’ is important for employees. A total of 95 percent of the respondents in the study said that ‘informal learning is as important as formal learning’. And a total of 94 percent of the respondents said that tracking data on informal learning can greatly improve the L&D strategy.

But there’s a gap in companies that actually track this data and align it to their L&D strategies.

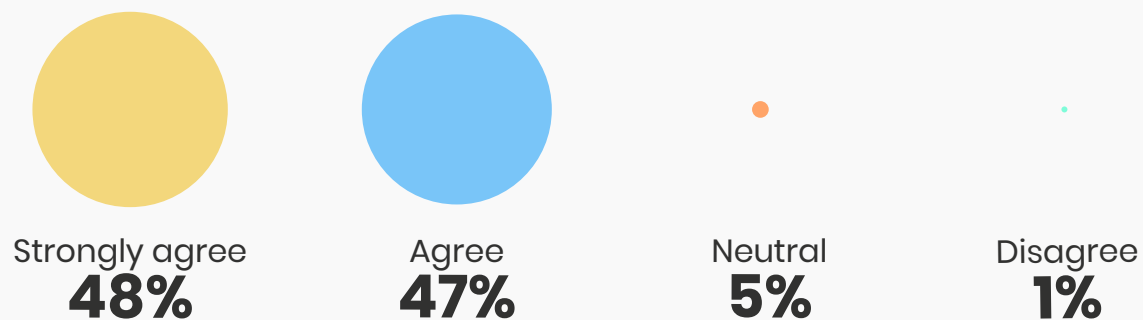
Only 42 percent of the companies said that they ‘track’ learning that is not mandated by the L&D and organization. While some HR leaders pointed out that they would not prefer to track learning that’s beyond the mandate, still others noted that any additional learning can positively impact performance ratings.



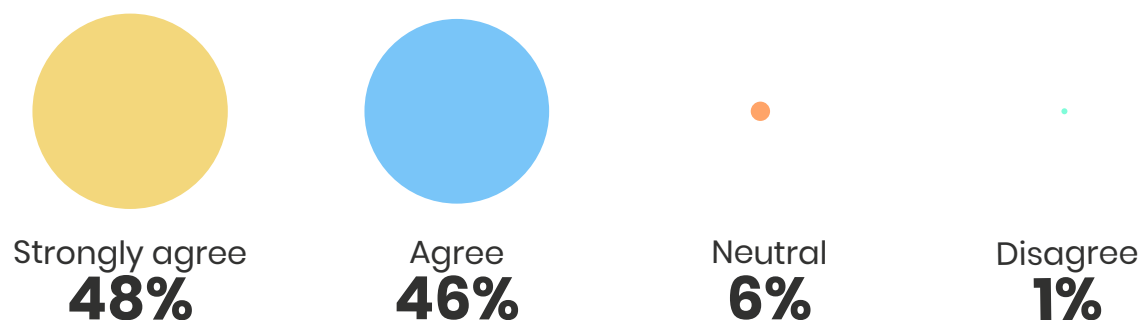
Do you track learning that is not mandated by L&D/Organization i.e., non-structured/ informal learning?



Informal learning is as important as formal learning.



Tracking data on informal learning can greatly improve L&D strategy.

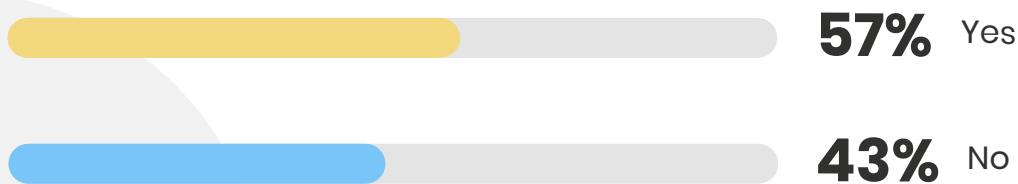


TREND 4:

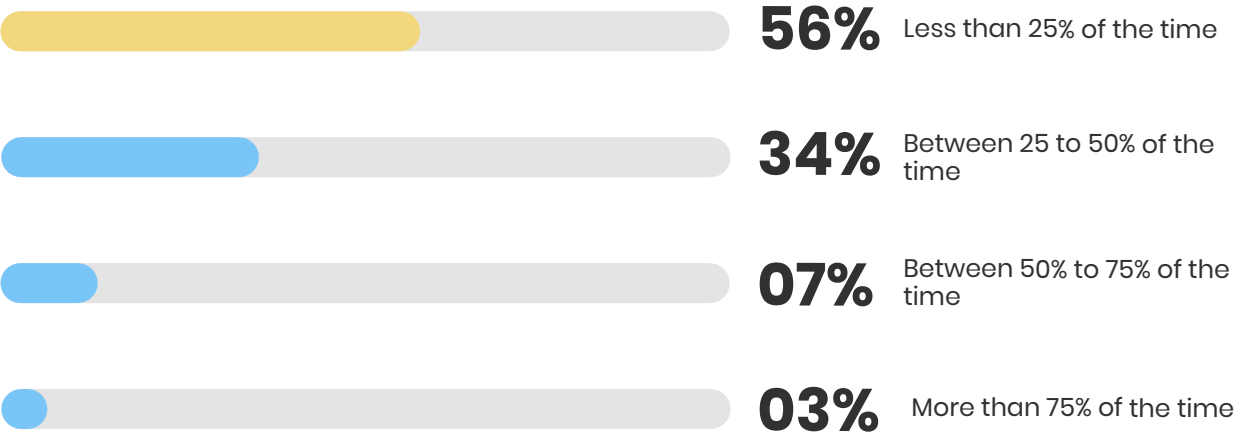
Huge opportunity to upgrade digital learning

Despite the desire to adopt digital learning tools, there remains a huge opportunity to upgrade digital learning tools. About 43 percent of the respondents said they aren't using new-age digital learning experience platforms. And a majority of 62 percent of the respondents said that their investment in digital learning is less than 25 percent of their overall L&D budgets. This presents an opportunity for companies to re-think their digital learning strategies. The ongoing pandemic has permanently changed the world of work. As the opportunity to work remotely becomes a permanent feature for many jobs, the need for on-demand learning tools will be critical to build a continuous learning culture.

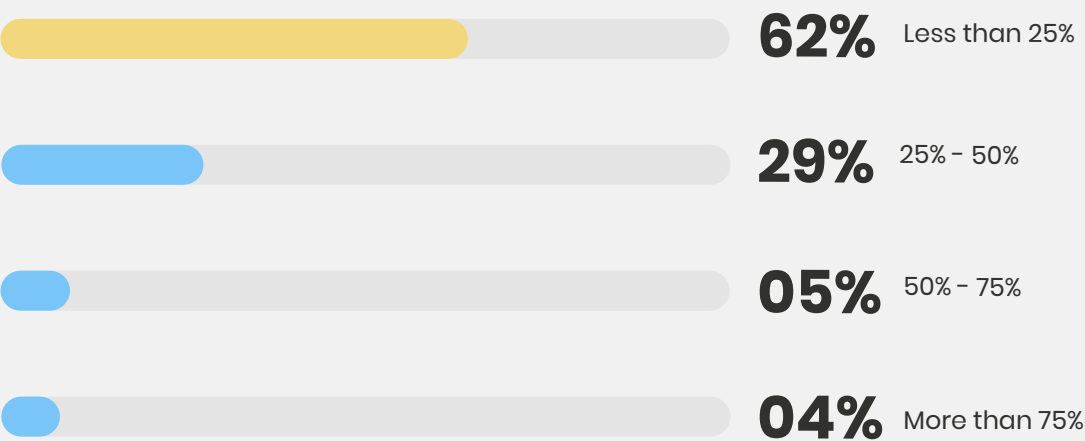
As part of your digital learning strategy, are you using any new-age 'learning experience' platforms?



What is the estimated time that employees spend on digital learning?



What is the portion of your L&D investment in digital learning vs. other modes?

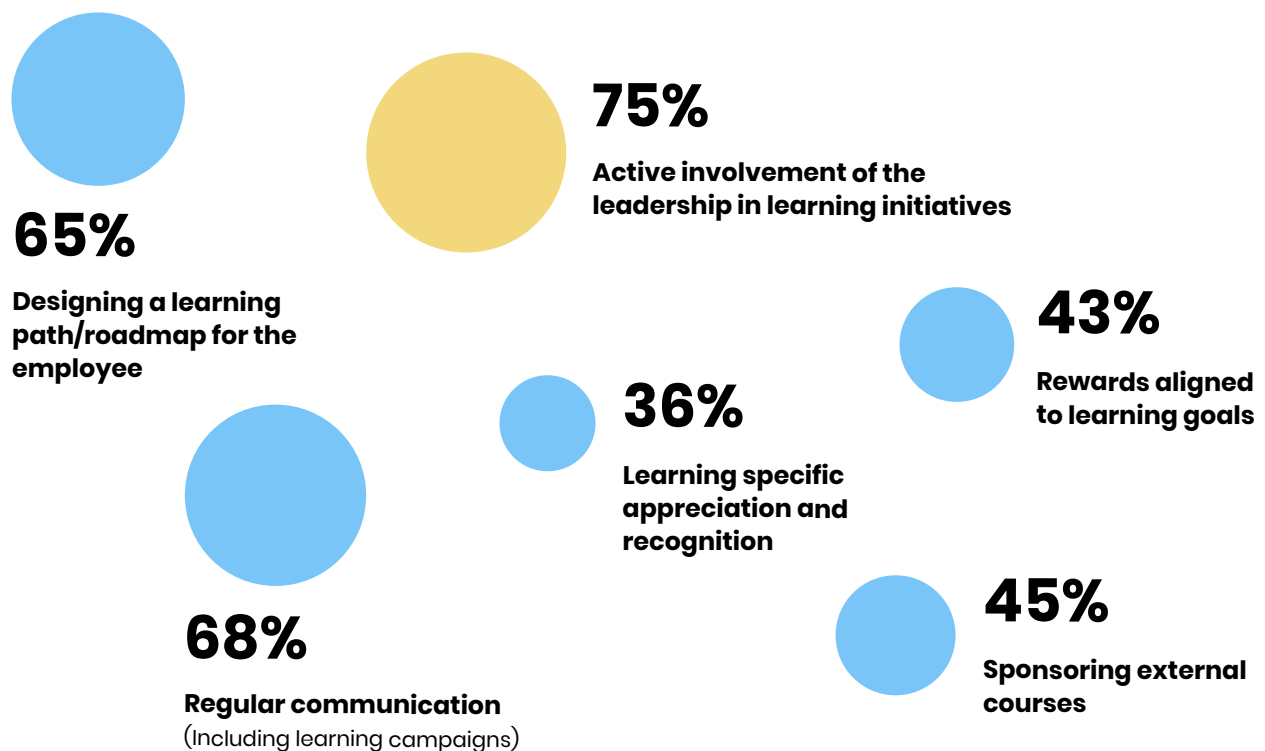


TREND 5:

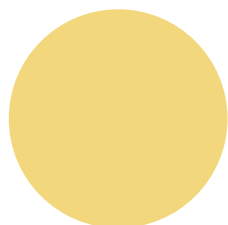
Leadership involvement, 360 degree feedback are critical impact measures

When asked about the effective methods of motivating employees to learn, most respondents noted that the active involvement of the leadership in learning initiatives (75 percent), regular communication (including learning campaigns) 68 percent and designing a learning roadmap for employees (65 percent) among the top methods. In the era of remote work, supporting employees learning programs by leveraging digital tools or encouraging employees to identify courses.

What are the most effective methods of motivating employees to learn in your organization?



What do you measure in order to assess the impact of learning?



82%

Feedback or surveys
(employee, peer to peer, managers)



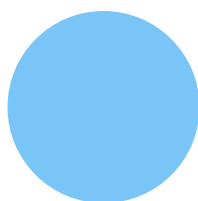
18%

Employee retention



37%

Employee engagement



72%

Assessments
(Pre/post learning, technical, cognitive)



48%

Performance
(against goals, kpis)



KEY TAKEAWAYS:

Planning your learning strategy

Map your skilling requirements for a hybrid future.

Which job roles are best required to be done at the office? Which roles can be accomplished remotely? And which roles are best accomplished at both places? What is the learning roadmap for these positions?

Identify and track both formal and informal learning:

To improve learning outcomes, focus on what the learner is actually learning. 95 percent of the respondents said that it's important to track informal learning, while 58 percent don't currently track it. Non structured learning can give insights into interest areas, study patterns, and engaging formats.

Active involvement of leadership:

Encouraging a lifelong learning culture is critical to the success of any organization. In this context, don't just engage the leadership for roadshows and campaign launch. Identify ways of engaging leaders using the learning platform.

Design action steps to enable employees to overcome fatigue.

One of the significant concerns in a remote working environment is how to deal with fatigue - whether its related to learning or work, prepare a checklist to enable your L&D team, line managers and employees to tackle fatigue

Audit your learning tools and review the opportunity to upgrade learning platforms:

A majority of the participants in the research said that although they use digital learning platforms, it's share in the total learning budgets is less than 25 percent. With new intuitive experience platforms, it is easier to align employee expectations with advances outside of learning platforms. Check if there's a need to upgrade your learning systems.



EXPERT PERSPECTIVES



L&D is changing along with the business – Tata Management Training Centre

Technology is fundamentally reshaping what possible both for the learner and the coach. It's time to re-evaluate learning paradigms.



Emmanuel David

Director, Group Human Resources
TMTC

The L&D function is changing – there are external and internal shifts that are transforming the function. It can no longer serve as the gatekeeper for learning. With growing technology prowess, there is a need to adapt and change as per the needs of the learner. Business relevance and scenario planning are becoming increasingly important and the L&D function needs to be trained quickly to adapt.

Here are some ways the function is changing:

Changing job roles and function

The on-going pandemic has transformed the shift in jobs. Today, sales professionals need to know how to sell without seeing people, and business leaders need to be able to deal with Unions virtually. And there are jobs that have become less relevant, while some others have the scope to grow.

The imperatives for the L&D function would be to train themselves to the possibilities that are now available, whether it is personalizing learning interests, or nudging information, leveraging bots to support the trainer and coaching the faculty on the various avenues of digital technologies. The job-based shifts need to be mapped to learning shifts too.

Creating superior engagement

If there's less engagement, then there's going to be less accountability. The L&D function needs to ask themselves the question – how do we create superior engagement?

While part of the answer lies in making programs business centric, learning also has to become democratized – where every learner is important.

Within the allowed norms of privacy, technology can be leveraged to understand – when is a learner most likely to learn? What are they likely to learn and how are they learning?



Learning outside conventional bounds

At Tata, we ask the questions – are people learning something that isn't being taught? And are we teaching programs that aren't being learned?

When it comes to non-conventional learning, there are certain focused ways of thinking about them – it often involves challenging learning and work paradigms to encourage the learner to think through innovative solutions.

In one training retreat to the Vikram Sarabhai Space Center, employees learned about how the research center doesn't align individual KRAs. In yet another one workshop, learners learned about the abundance of fishing resources from fishermen, who were willing to share their catch with each other. An awareness of these non-conventional learning tools requires a perspective that learning can happen anywhere, and at any time. This knowledge will be critical for the future.

Today, Technology is fundamentally changing what's possible – both for the learner and the trainer. While previously, engaging in a simulation exercise meant scheduling an activity for over 2-3 days, today's technology can break the learning cycle into byte sized learning into 30 minutes and another 30 minutes – and include feedback to help the learner improve their performance. Over time, there are going to be superior AI models that are going to involve sentiment analysis to support the learner in their learning journey. And it's time for L&D to embrace the change and lead the way, while making learning truly democratic.



L&D needs to become agile – Welspun Group

While technology is transforming how learning is delivered and accessed, there is a need to understand the human connect, and personalizing content.



Bidisha Banerjee

Group VP – Learning, Culture and Employer Branding
Welspun

At Welspun, the company's business spans a wide array of business lines – from home textiles, oil and gas, to infrastructure, across the company's over 30,000 employees – this is a mix of talent skill sets that spans designers, engineers, finance leads, technology leads.

What brings these diverse groups of businesses and people are the common values that the group shares– customer first, technology and innovation, inclusive growth, collaboration. And to reinforce the culture, there was a need to align competencies across the levels that became a challenge area. We moved from “learning as events” to a culture of curiosity. Here's how the company re-aligned their learning priorities.



Re-prioritizing learning

01.

The shift to digital:

One of the shifts after pandemic has been to ensure that all the learning activities planned for the year continue as is – but just move to a digital platform. We are looking at the shifts in both, a macro and a micro strategy as well – where we have some overarching themes for the year that happens in large cohorts and individual learning programs that are aligned to the Skillsoft platform. Then there are group learning or peer learning initiatives.

02.

The networking challenge:

Since the human contact has been reduced due to various preventive measures, networking has been a challenge. Immersion programs, offsite have been suspended. So the human connect which is still an essential part of learning programs has been a challenge area. The company is encouraging informal learning experience sharing sessions virtually. Learning cohorts, meet over a fun icebreaker related to learning etc., This reinforces the power of collective wisdom and encourages learning application.

03.

Building in feedback:

Getting the feedback on learning is critical to designing programs. The peer learning modules, for example, identified common themes around which we planned webinars, and disseminated conceptual content and invited external speakers to share their expertise. And we encourage employees to share what worked for them and what did not work for them.

04.

Informal learning:

There are a lot of resources that are available to employees on the digital platform. Employees often choose courses that are not necessarily mandated. Apart from that, there are virtual informal talks with experts that also serve as a way to engage in learning.



The future of learning

As technology becomes increasingly significant, there will, over time, be an increased emphasis on Virtual Reality based experience that will be made available.

The future of learning is exciting – with increased focus on individual profiling of learners, service providers will have more sophisticated tools to nudge employees based on their own interest as well as organizational focus areas. The possibilities for data enabled benchmarking will also be important – as employees assess themselves on their own learning, they should also be able to bench mark their own careers against their peers elsewhere. That will be a new frontier in learning.



Learning in the flow of work needs the right mindset – Dr Reddy's Labs

Defining the learning outcomes sharply and creating an environment for learning will define the ultimate impact.



Dr. Swatee Sarangi

Global Head – Learning, Leadership & Organizational Development
Dr. Reddy's Laboratories

The L&D landscape is still evolving in the backdrop of the pandemic. When you look at the upcoming 12 – 15 months, there are three skill sets that are being reemphasized – data, digital and design. These three skills are going to be the key focus areas across multiple sectors. The L&D agenda will also focus on the mindset – including agility and a growth mindset that will be central to how employees contribute effectively. The broader culture of learning will also come into focus. How employees acquire and share information, how they collaborate and augment the world of work is going to be critical.

The pandemic has shown us that the future will be a hybrid workplace. And that means companies need to prepare for a 'phygital' model – one that accommodates employees working remotely, in the field and in the office.



The learning experience

Learning has a lot to do with experience. It is difficult to keep up a high energy online and we're needed to design games, simulations etc. to keep an engaged workforce.

Ultimately, learning is about change in behaviour and work – which means the way you are doing work also has to change. And that change can be augmented and supported not just in a classroom.

L&D professionals need to ask whether they're bringing about incremental and transformation change in the flow of work. Action learning projects, sessions with subject matter experts, developing a community of learning and development, and building efficiencies at work, all of which have a direct impact on the culture of learning.



Learning outside work

There is a lot to be gained by learning that is not strictly confined to the modalities. It's necessary to go beyond the understanding of learning as an episode – with a start and a stop. There's the pre-learning and post learning experience that contributes directly to the learning process. At Dr. Reddys that take the form of 'Learning Buzz', 'Learning Café' initiatives that help employees engage in topics of relevance in an informal set-up as a learning ritual.



Evolving impact measures

A variety of impact measures can inform the learning curve – from improving productivity, change in behaviour, knowledge or education, increased engagement and exposure. The right blend of informal and formal modes of learning can impact multiple measures including. It is the job of the L&D function to curate and track experiences which are impactful for the learner and value adding for the business.

L&D professionals are ultimately accelerators of the business outcomes and learners aspirations. And that needs to be defined and measured with a sense of purpose. At Dr. Reddys every learning intervention needs to be articulated in the form of XYZ metrics that we want to achieve. Only if the measures are sharply defined, check-ins can help drive the needed outcomes. Learning is a journey. And in that journey there are a variety of ways to apply the learning. Along the different levels of measuring impact – from feedback to assessment, and then on to behaviour change it is possible to clearly define outcomes. The ROI measures are possible when projects are aligned and there's intervention based measurement.



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