



Is L&D fit for the future?

Today's technology vs tomorrow's transformation

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AGENDA

- ▶ Digital Learning Research: Critical drivers and trends to watch on digital learning
- ▶ Who's really using what today?
- ▶ Impact on supplier selection and performance
- ▶ NEW Fosway 9-Grids™ for Learning

Europe's #1 HR Industry Analyst

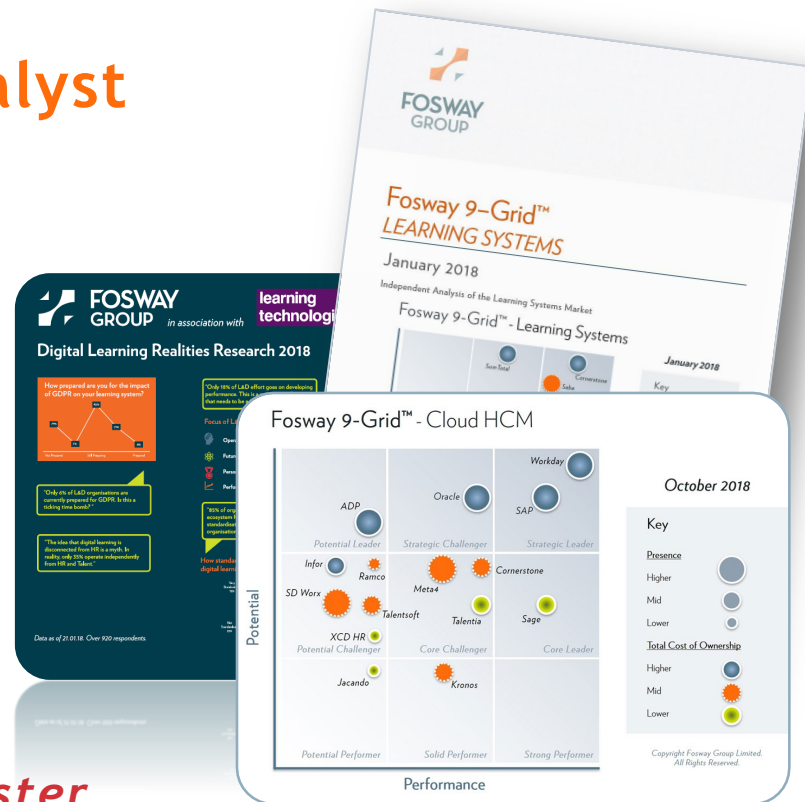
Founded 1996

In-depth corporate research
on **Next Gen HR, Talent and Learning**

Analyst & advisory services
to **European & International
HQ multi-nationals and corporates**

Independent vendor research
and **EMEA market commentary**

Make better HR buying decisions faster





MARKET
TRENDS!

What are the facts about
Digital Learning ?



KEEP
CALM
AND
CHECK
THE FACTS

Work is changing rapidly,
so must Learning!

MODERN WORKFORCE

← 50% →



BABY BOOMERS

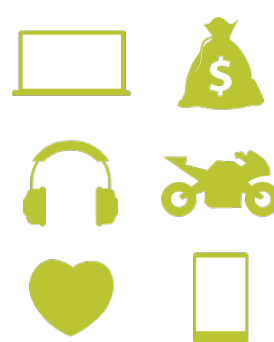
Post wwl baby boom, born roughly 1946 - 1964.



GEN X

Born early mid 1960s to early 1980s.

← 50% →



GEN Y

Often called Millennials. Born 1980 to late 1990s.

On their way....



GEN Z

Born early 2000s and on.

We also know *work is changing* ...

*Learning, Talent & the Modern Workforce
Fosway Group 2017*



45%

more often working in
diverse teams



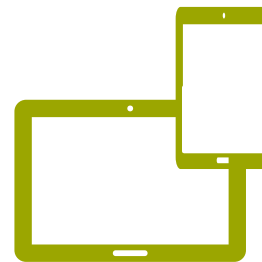
68%

more often working
with virtual
technology



55%

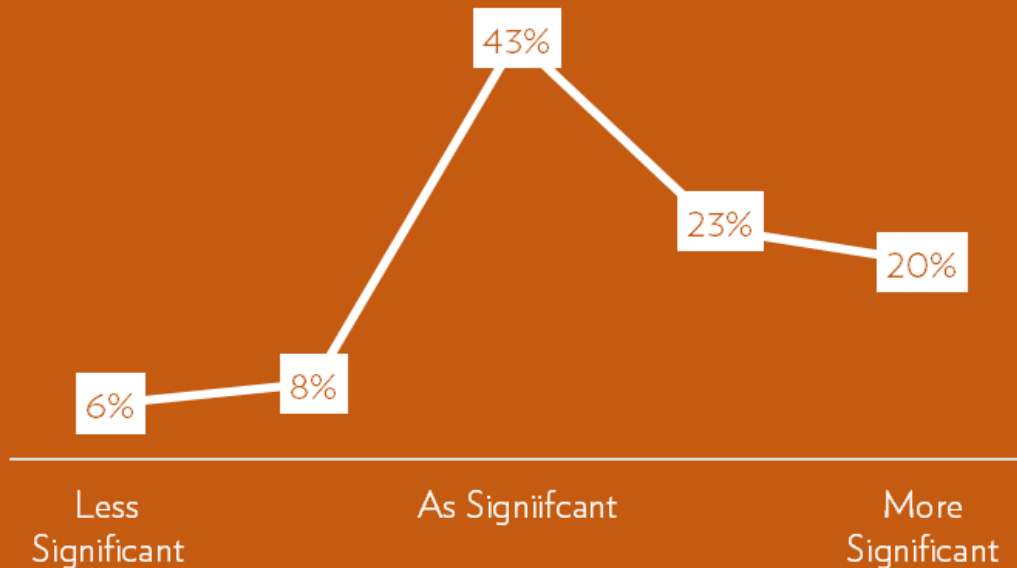
collaboration and
social media tools
are more often key
to working



44%

employees work
primarily using
mobile devices

How significant do you think Skills Gaps will be for your organisation in the future?



87%

see skills gaps becoming as, if not more, significant in the future

**THE WAR FOR TALENT
IS NOT GOING AWAY!**

*Learning, Talent & the Modern Workforce
Fosway Group 2017*



*... and especially because of
changes in the world of work,*
**employees
increasingly need
to learn faster**

*Learning, Talent & the Modern Workforce
Fosway Group 2017*

Digital is a mindset,
not just a form of delivery!

Digital Transformation is a REALITY

- 70% are In Progress
- Only 4% have completed their digital transformation of Learning?
- 23% are still Planning

Where is your organisation in its journey with digital transformation of learning?



3%

Not Applicable



23%

Planning



70%

In Progress

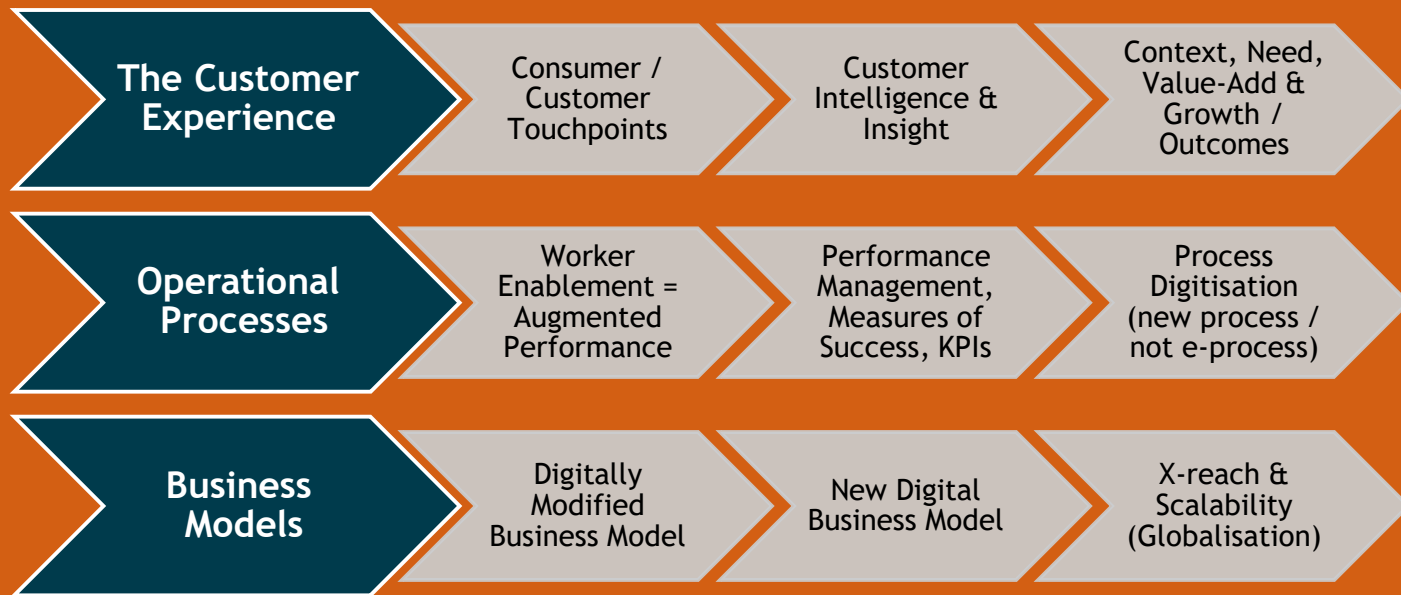


4%

Completed

Marginally ahead of HR but behind the wider organisational transformation

A DIGITAL TRANSFORMATION of...



Investment is growing,
but so is the speed of change

Where do companies expect to spend more?



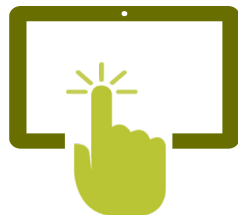
50%

Expect Increase
Investment on
PLATFORMS



45%

Expect Increase
Investment on
**INTERNAL
TEAM**



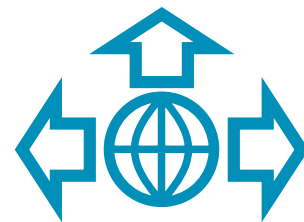
44%

Expect Increase
Investment on
CONTENT



28%

Expect Increase
Investment on
SERVICES



17%

Expect Increase
Investment on
OUTSOURCING

Digital Learning Realities, Fosway Group, Feb 2018

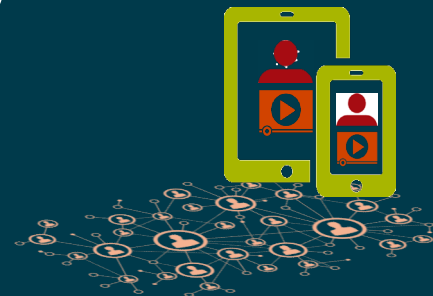
Digital Learning - Top Growth Areas

Content

Video (66%)
User-generated (60%)
Microlearning (59%)
Mobile (59%)
Blended learning (57%)

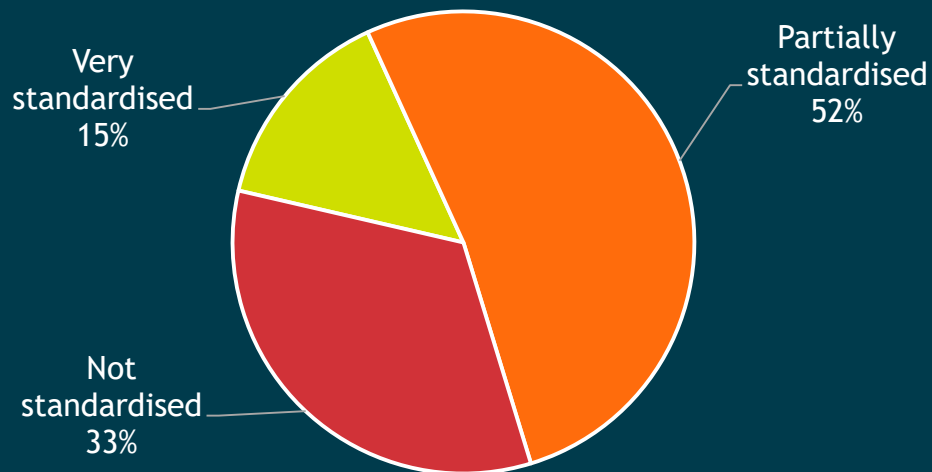
Learning Platforms

Learner engagement (64%)
Social/collaborative (63%)
Mobile (61%)
Analytics (60%)
Authoring systems (57%)



Digital Learning Realities, Fosway Group, Feb 2018

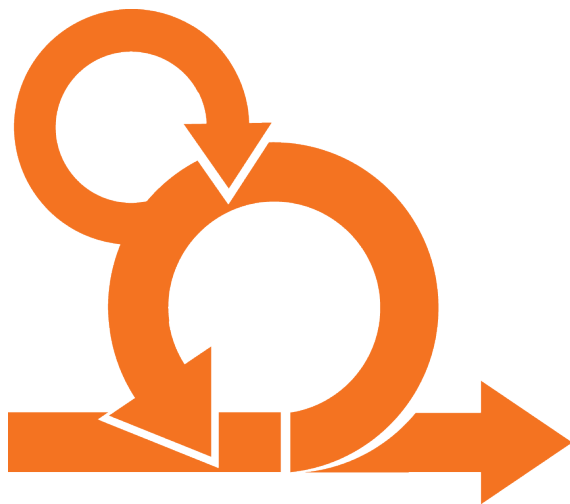
How standardised is your approach to digital learning across your organisation?



**Most have a
fragmented
ecosystem - 85%**

Is the level of standardisation
a problem, or should we be
revelling in diversity?

MOST Learning is not MODERN, not PERSONAL and not AGILE



ONLY ...

- ▶ 20% often personalise learning
- ▶ 20% are thinking about agile learning
- ▶ 20% often gamify the learning experience

If you think you are creating an engaging modern learning experience - then think again

Most likely you and your suppliers are not engaging learners in a **personal consumer-like experience** (despite all the rhetoric and UI work)

Digital Learning Realities, Fosway Group, Feb 2018

Building a Modern Learning Architecture



New \neq Good \neq Effective

Quality of Digital Learning from Suppliers



Content

Bespoke e-learning
Content hosting
Video
Off-the-Shelf content

Platforms

Content authoring/LCMS
MOOCs
Portals
Virtual classrooms

Content

Virtual & augmented reality
Gamification & badges
Serious Games
Performance support

Platforms

LMS
Mobile
Social/collaborative
Analytics



Digital Learning Realities, Fosway Group, Feb 2018

The reality is that L&D does too little to create **effective learning**



Less than 1/3rd more often support learners' application of learning in the workplace



Less than 1/3rd look to sustain learning in the workplace



More than 55% fail to consistently measure learning progress



60% are failing to systematically drive the development of mastery and expertise



Only 26% more than frequently adopt multi-channel learning delivery

Digital Learning Realities, Fosway Group, Feb 2018

YOUR EXPERIENCE OF DIGITAL LEARNING CONTENT

How do you rate the quality of digital learning content you get from your suppliers?



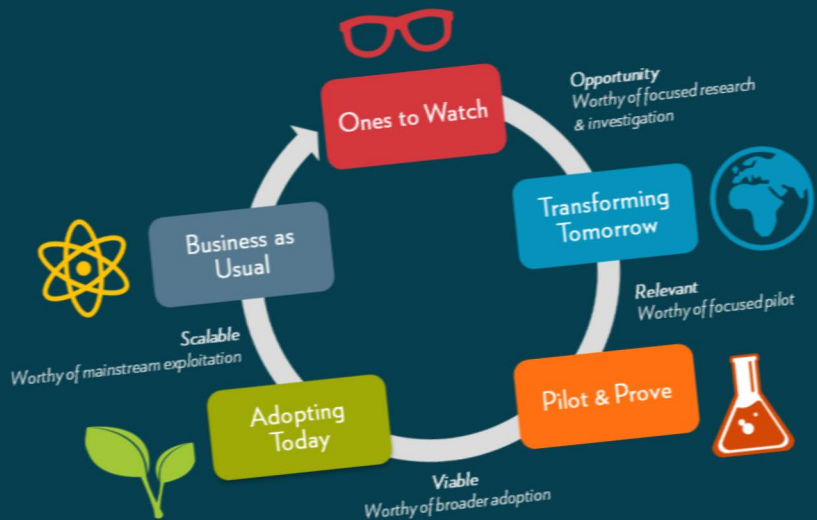
BEWARE:

The most **HYPED** solutions are your **biggest risk...** e.g.

AR/VR

Manage innovation carefully!

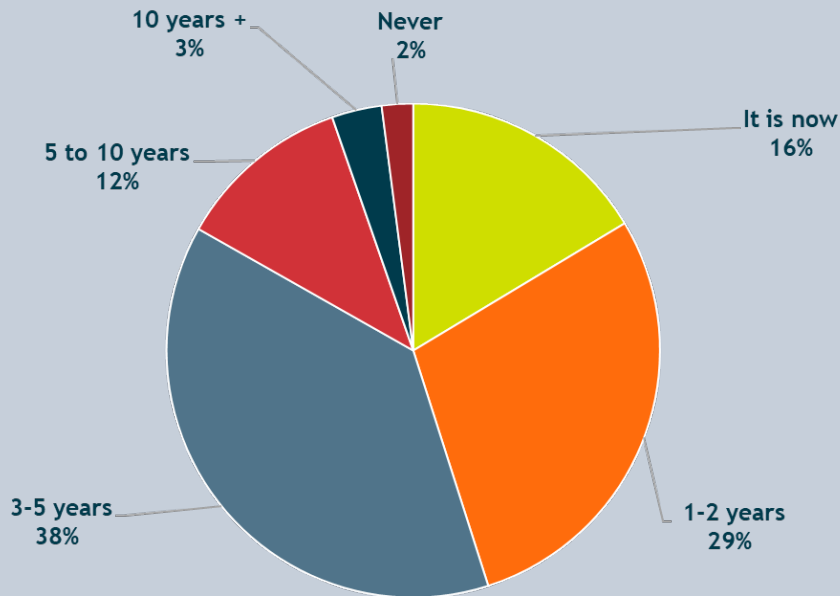
Fosway Model for Managing HR Innovation



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very good Good Acceptable Poor

When do you think the impacts of automation, machine learning, artificial intelligence and/or robotics will become truly significant for your workforce?



95% think that
AI and RPA will be
truly significant

45% < 2 years!

European HR Realities, Fosway Group, October 2018

Significant pressure for Vendors to respond to more diverse / next gen requirements

... e.g. the factors in Fosway's Learning Systems analysis

▶ **Learning Enablement** **- 107 factors**

- Assessment & Evaluation
- Formal Learning
- Workplace Learning
- Collaborative & Social Learning
- Competencies & Capabilities
- Development Planning
- Extended Enterprise
- Learning Content & Asset Management

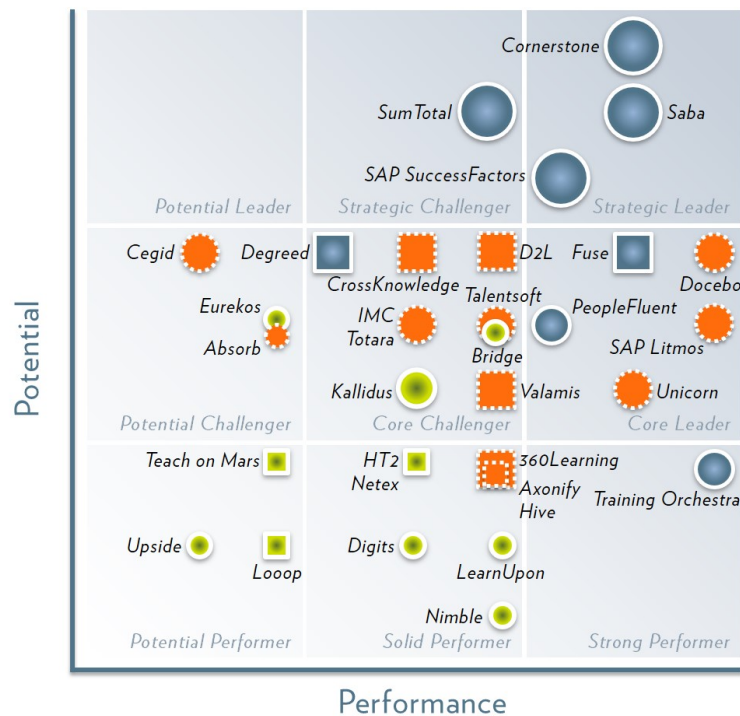
▶ **User Experience** **- 69 factors**

- Experience Administration
- Learner Portal
- Learner Relationship Tools
- Manager Portal
- Mobile Learning
- Analytics, Dashboards and Reporting

▶ **People, Finance & Systems Mgmt** **- 46 factors**

- Organisation & People Management
- Finance, Budget & Ecommerce Management
- Integrations (standard out of the box connectors)

Fosway 9-Grid™ - Learning Systems



January 2019

Key

Type

LMS

NGLE

Presence

Higher

Mid

Lower

Total Cost of Ownership

Higher

Mid

Lower

**NEW 2019 Versions
just announced**

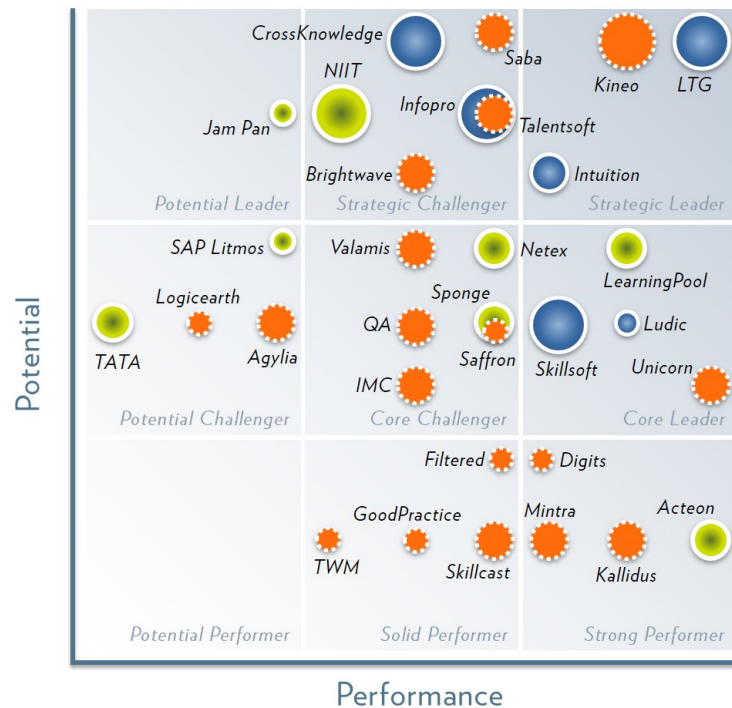
**Learning Systems &
Digital Learning**

To discuss:

**Fosway Analyst
Lounge Stand A04**

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Fosway 9-Grid™ - Digital Learning



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Lounge Stand A04**

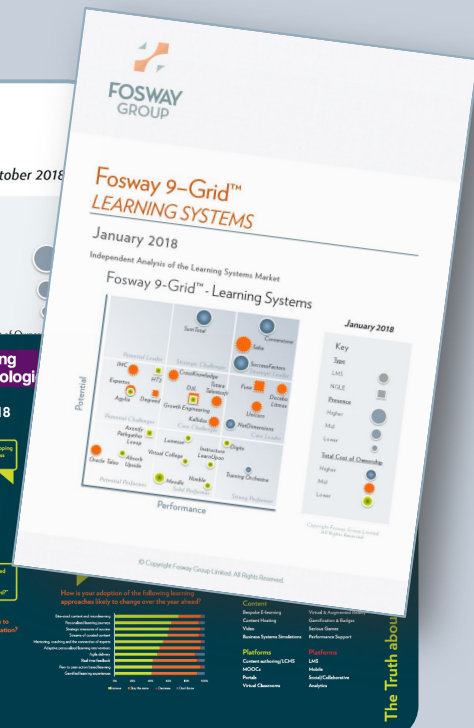
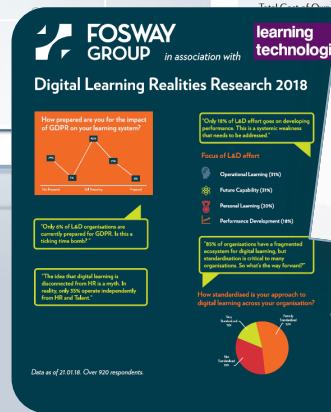
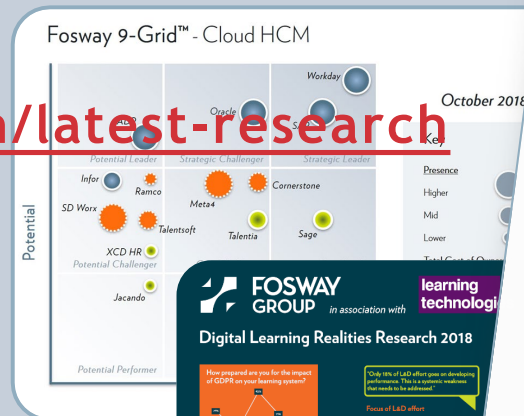
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