

The 2021

Global Digital Learning Maturity Report

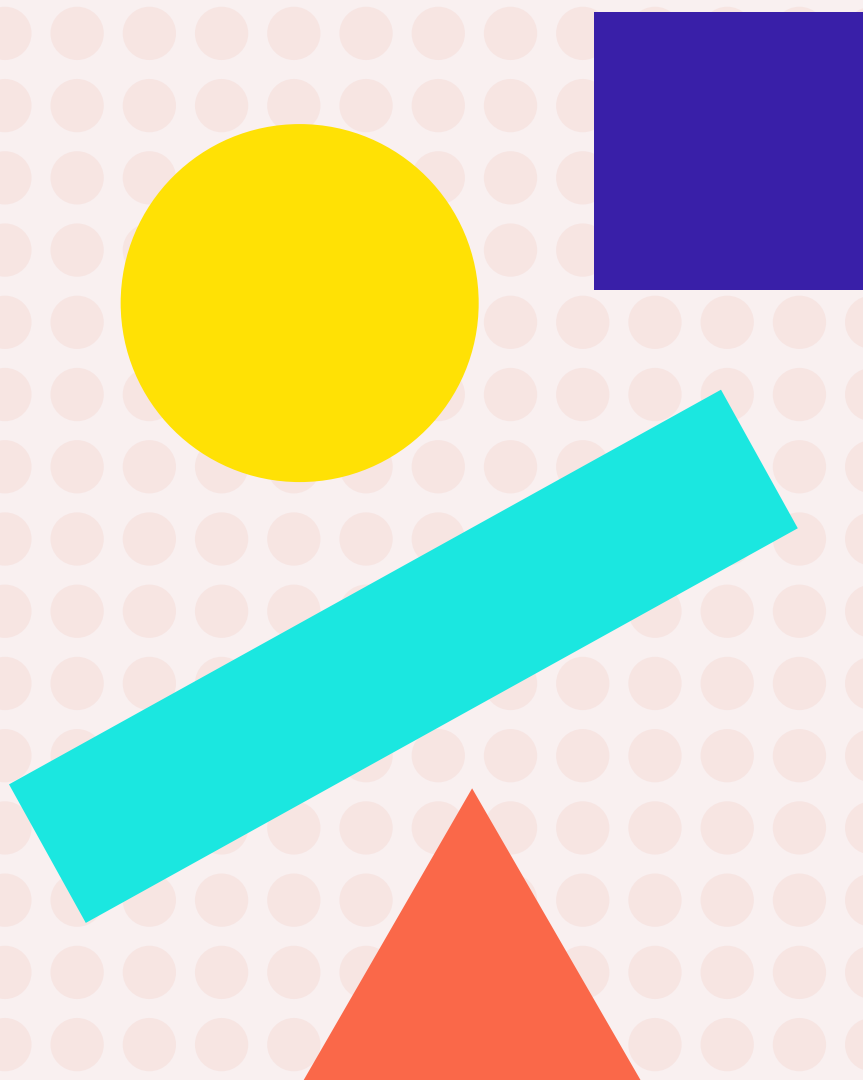


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Foreword

Expectations in terms of building strong capabilities and measuring the impact of upskilling and reskilling strategies continue to be the top L&D priorities.

Having the right skills is increasingly critical to business growth and innovation. Corporate organizations are exploring ways to scale up skills acquisition and reduce time-to-competence. This depends on committed investments in new people capability development, enabling a learning climate, and smarter organization of their learning. Digital learning is an essential part of the solution, and digital learning maturity should be continuously evaluated and adjusted in alignment with business objectives.

While new technologies are revolutionizing how people learn and grow in the modern workplace, learning maturity models have also evolved to reflect and predict how digital learning can help enhance employee performance and business outcomes. Understanding digital learning maturity is a key step towards increasing the impact of L&D strategy and investments. But before

implementing real and effective change, organizations must first gather all the facts regarding their current learning maturity level, and identify areas the organization excels in and opportunities for development.

To help businesses understand and measure where they are on their digital learning maturity journey, CrossKnowledge has developed a comprehensive framework, building on existing models, research, and client experience, that enables L&D to assess and identify areas to improve employee skills building. The framework is articulated around the six essential digital learning dimensions.

The value of a digital learning maturity model lies in the way it can be applied and activated by L&D in the organization to meet learning-impact objectives. It should enable them to operationalize the digital learning strategy, identify gaps, define areas for acceleration, and enhance the L&D value proposition. These six dimensions, explored in more detail below, are critical to the successful development of digital learning maturity.



Line managers

This dimension analyzes the involvement of line managers in the learning process and within the organization's learning climate. It identifies how effectively line managers are actively supporting and facilitating employee performance development and learning. In parallel, it analyzes whether there is a positive climate for learning, with a focus on skills building, career development, and knowledge sharing.



Learners

This dimension determines how learners are supported in their broader learning efforts. It focuses on learner marketing and communication to engage learners to start, complete, and embed their learning initiatives, taking ownership for their personal development. In addition, this dimension covers the extent to which social and informal learning is provided and encouraged.



Learning experience

The third dimension focuses on learning design methodology and the extent to which this is agile, based on a mindset of design thinking and performance consulting. In parallel, it evaluates whether the learning offer provides a personalized learning experience, based on data-driven design and the real needs of the learner.



Learning architecture

The backbone of digital learning, this dimension assesses whether employees can access their learning anytime, anywhere, and on any device. In addition, it reviews the extent to which the learning ecosystem is fully integrated within the bigger organizational ecosystem (such as Office365 and CRM) and whether learning happens in the flow of work.



Learning analytics

Without data analytics, it is challenging to realize optimal learning outcomes and benefit from learning investments. This dimension explores whether the organization's learning analytics are systematic and reliable, with a focus on outcomes and performance metrics. It also investigates if KPIs are systematically defined at the start of each learning initiative and related to desired and measurable performance outcomes. This enables L&D to report on learning outcomes, share progress with individual learners, and adapt learning solutions based on data and evidence.



L&D capability

A key enabler for digital learning maturity in every organization, this dimension assesses if the L&D organization has an operational, tactical, and strategic governance model in place, with strong business buy-in for (digital) learning initiatives and clear definition of learning priorities. Another focus area is whether the learning strategy is more than a yearly action plan, as it needs to include the why, what, and how of all corporate skills development initiatives.

Real-World Insights

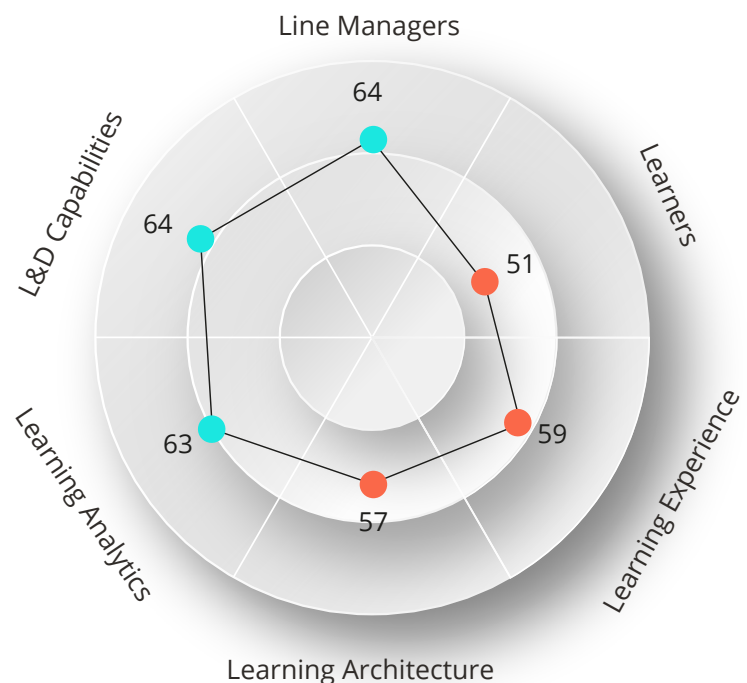
To gather real-world insights, CrossKnowledge surveyed a total of 198* L&D leaders, HR experts, and C-suite members from the Americas, Europe, and Asia-Pacific. The panel answered an online questionnaire tackling the six dimensions of the CrossKnowledge framework. The analysis contained in this report benchmarks the current state of digital learning maturity within businesses, and can help you do the same in yours.

The report sheds light on key questions including:

- What is the current state of skills maturity within corporate businesses of all sizes?
- How does the perception of upskilling differ depending on the sector, company size and employee role?
- What can be learned from these findings to help build upon or address learning gaps in digital learning?

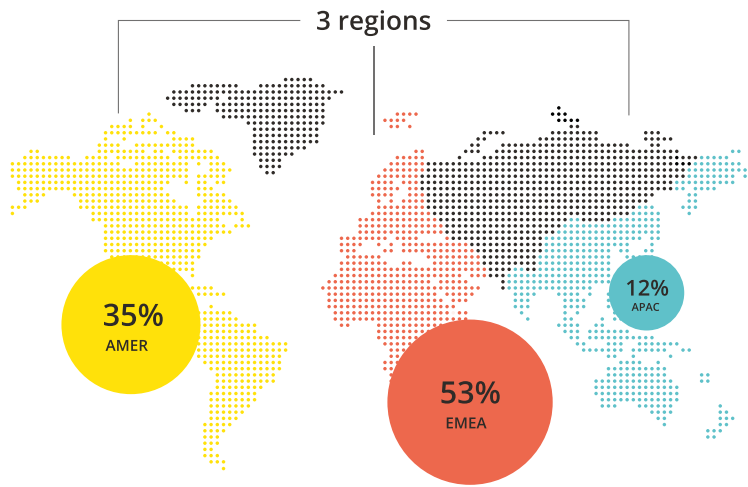
Participants were asked to rate their experience over several dimensions of their digital learning strategies. The scoring system used a scale of one to one hundred.

Rating per dimension

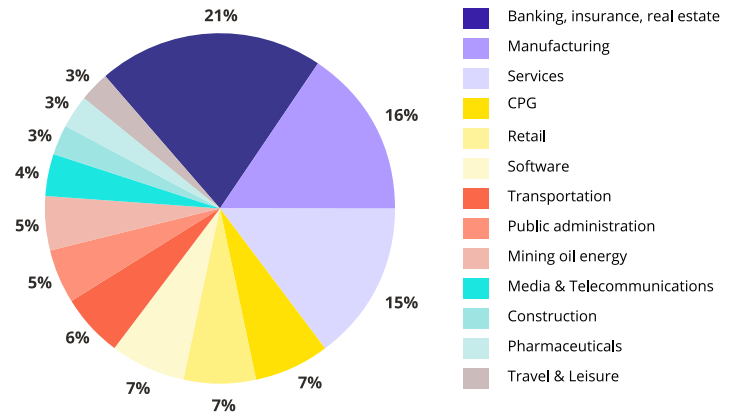


*Perception based on individual participants, accounting for one viewpoint on their organization's digital learning maturity.

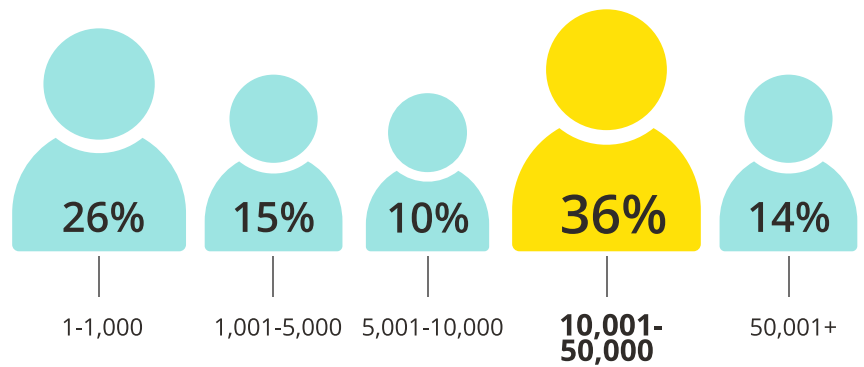
Region



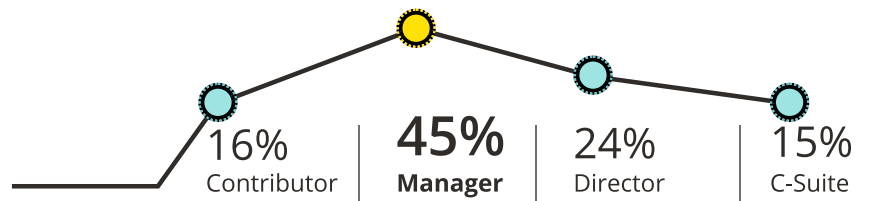
Sector



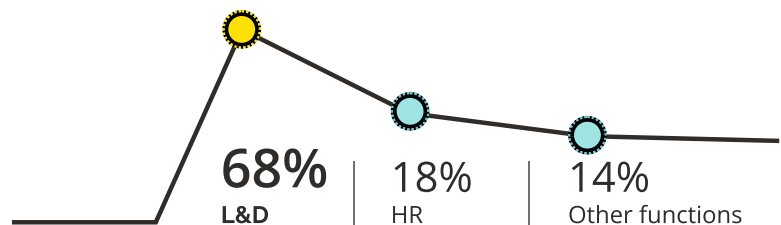
Company size



Seniority



Job function



Initial Findings

Company Size

There's a strong correlation between company size and perceived level of maturity in all dimensions – the larger the organization is, the greater its maturity.

Job Seniority

The C-suite typically view their organization's digital learning maturity to be more advanced, contrary to the contributors who perceive it to be at a lower-intermediate level. Directors and managers view learning maturity more favorably than contributors, and are aligned in their perceptions throughout.

Job Function

Other departments show a lower level of confidence in their organization's digital learning maturity compared to HR and L&D departments.

Sector

Pharmaceuticals stands out as a sector that has adopted a more advanced digital learning approach, whereas Media & Telecommunications and Public Administration are significantly behind.

Dimension

The Line Manager is the strongest dimension; the Learners dimension is the weakest.

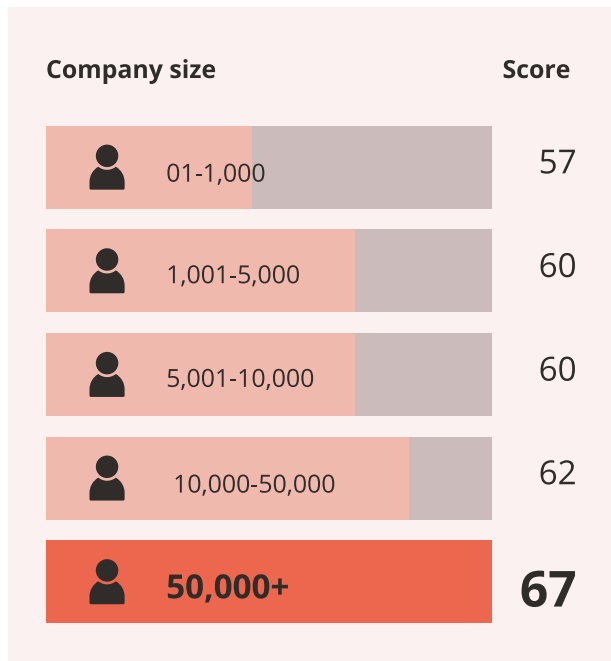
Overall

No averages exceed 64 out of 100 in any of the six dimensions, indicating a need for progression. Organizations should be on a continued growth journey to achieve greater learning maturity.

The Full Report

1. L&D Capabilities

Results show that the bigger the organization is, the higher the score, with a 10-point difference between companies with less than 1,000 employees (scoring 57) and those with more than 50,000 employees (scoring 67).



L&D are the most positive about their approach, in the upper-intermediate stage with a score of 65, whereas other departments are in the lower-intermediate stage with a less satisfied score of 56.

Larger organizations often have more professional L&D departments, with diverse and expert capabilities. An additional sign of



professionalization is the existence of a learning strategy and governance. Our client interactions show that the pandemic has accelerated the need to develop a business-aligned L&D strategy and establish stronger governance with business involvement. This tactical or strategic governance can support L&D in defining skills priorities for the workforce, and develop leadership development opportunities at the point of need.

According to recent PWC and McKinsey research, a growing number of C-suite executives are now involved in championing their organization's capability, as this is seen as a vital factor for future-proofing their organization. One of the implications of this increasing C-suite involvement is that they start to demand that L&D operate closer to the business and adapt their strategic capabilities.

The years 2020 to 2030 have been called the decade of upskilling. In light of this, L&D has become one of the most strategic functions as it focuses on key business priorities: attracting and retaining talent, motivating and engaging employees, creating a value-based culture, and building an employer brand. L&D across all sectors needs to increase its (digital) learning maturity to deliver on expectations.

2. Line Managers

Typically, it should be the role of line managers and business leaders to facilitate learning behavior within a company and lead by example. Our research has shown affirmation of a positive learning culture in most organizations, but this varies by region and job function.

Most respondents agree their line managers are at the upper-intermediate stage, fostering a largely positive learning culture within the workplace. They score a high 64, making them the highest-rated dimension across all organizations. Results show that C-suite and HR rated their managers' culture at a higher level (65 and 66 respectively).

When it comes to the highest-scoring job sectors, pharmaceuticals showed the highest average score (74), compared to the public administration sector with the lowest score (56).

These trends could also be due in part to company size and learning climate. As we've broadly observed, organizations with more than 10,000 employees surpass smaller ones when it comes to their digital learning maturity satisfaction levels.

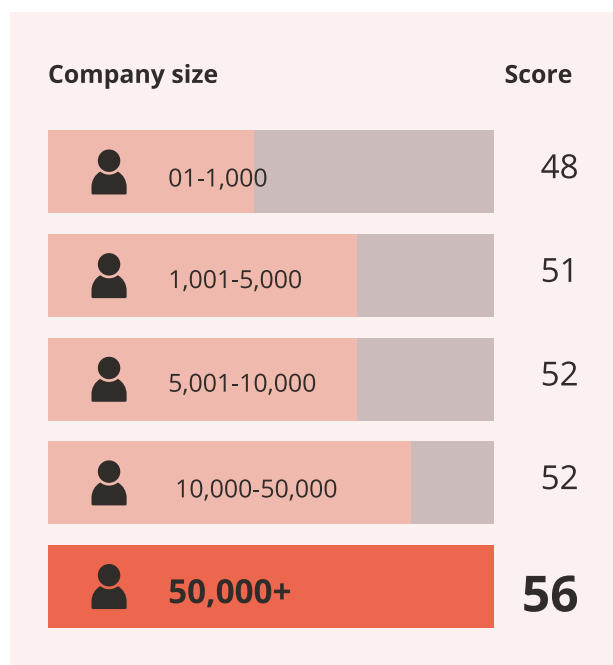


Regardless of the organization's size, it is important to invest in building a good learning climate supported by line managers. We know from research (Hamidianpour et al., 2015) that a supportive organizational climate in small- and medium-sized organizations can foster a positive and significant impact on employee's creativity. Creativity plays a big part in learning and organizational re-invention, so having the climate that supports this can help companies stay ahead of the competition.

The small difference we see within the responses can be explained by the fact that within large organizations, the positive impact is still present, but another problem arises. Here we see that managers may not be able to lead their employees in creating a supportive learning climate (Hornsby & Kuratko, 2003; Newell & Scarbrough, 2002). According to Albrecht et al. (2018) and Armstrong (2000), medium-sized and large organizations explain their hampered growth by poor management skills with a focus on entrepreneurial skills.

3. Learners

The Learners dimension is in the lower-intermediate stage, holding the lowest average score out of all of the dimensions at just 51. HR staff and managers feel the least positive about their learner engagement, averaging even lower scores of 48 and 50, whereas contributors show a better perception with a score at 56. It's clear also that the smaller the organization is, the weaker it is in this dimension.



The Learner dimension measures how well organizations are able to motivate learners to acquire skills, share knowledge, and get involved in peer-to-peer learning.



Learner engagement appears a common problem regardless of the function and seniority. However, as with the L&D capabilities dimension, the bigger the organization is, the higher the score.

To remedy this, L&D teams must turn to marketing techniques. By developing learner marketing capabilities, L&D will put learners at the heart of the learning process, engage them, and win their loyalty. It requires a 360-degree plan comprising a variety of marketing and communication activities, such as advertising training courses, putting an effective communication strategy in place, and bringing a consumer-grade experience into the corporate learning environment.

Incentives are another effective motivator to engage learners in digital learning. They need to have a clear understanding of how the digital courses can contribute to their personal development and success in the organization. Learners also view earning certification or micro-credentials as an incentive because this demonstrates mastery of important capabilities and personal investment in their own development.

Unsurprisingly, the Learner dimension is at the heart of engagement, which has a huge impact on building successful and effective training programs.

4. Learning Experience



Organizations are largely ambivalent about their learner experiences, in the upper-intermediate stage, scoring 60 on average. Interestingly, HR respondents were found to be the most positive about their organization's learner experiences, with an average of 62. Here again, the bigger the organization, the higher the perception with a 13-point difference between large and small organizations. In terms of job seniority and job functions, C-Suite and other departments undervalue how the learning experience is managed with a score of 59 and 57 respectively.

Learning experience is a key dimension of digital learning maturity that measures the interactions that end-users have with their digital learning platform, and the emotional reaction or behavior that results from their training.

The bigger the organization, the more likely learners will have had some online course experience in the past. It's these online course experiences that build comfort with the learning technology. The more past online experiences learners have, the better they perceive quality and the higher their motivation to learn more about technology. Both of these are related to the satisfaction of the online learning experience (Rodriguez et al., 2021).

On the other hand, we see that, with learners who have no online course experience, their comfort level is related to their motivation to learn about learning technology. In other

words, people will feel only as comfortable as the level of effort they are willing to put in. Unfortunately, these two factors don't impact the perceived quality of online courses for inexperienced online course learners. These research findings clearly reveal that the bigger the organization, the more likely people have had previous online course experience and the higher these learners will rate their online course satisfaction.

Alongside this, we also see an influence on the number of employees managed. In the research of Jones (2016), the number of employees a manager was responsible for was connected to their receptiveness, age, length of service, and position differences, and ultimately impacted their satisfaction with online training. The results linked usage and effectiveness to satisfaction with the online training.

This means that the more employees and managers who use the online learning system, the more effective they perceive it to be. This most likely stems from the ease of use that builds over time with repeated usage. Not only will managers perceive the system as more effective, but they'll also rate the maturity with the online learning system and training available higher because of their increased usage. This might explain the difference between HR respondents and other respondents, since they are likely to use the system more than their counterparts.



5. Learning Architecture

The Learning Architecture data shows that most organizations believe much more can be done to improve their learning architecture experience. This is reflected in its lower-intermediate stage score of 57 – the second lowest of all segments overall.

Although this seems too often to be the case, the importance of investing in a strong learning architecture should not be overlooked. A robust architecture strategy will help you add value to your organization by prioritizing and deploying resources to achieve your business goals, as well as clearly mapping learning needs to your overall business needs.

The difference between company size may appear marginal (7 points), however the results confirm that the bigger the organization, the higher the perception level.

Regionally speaking, the learning architecture perception levels of those in APAC are slightly higher than AMER and EMEA, in the upper-intermediate stage at 61. These regional findings, in particular, link back to one of the key macro trends observed in the data: APAC businesses are outperforming other areas in

terms of digital maturity. Levels of regional financial investment undoubtedly come into play here, as well as the fact that Asia in its entirety accounts for around half of the global internet users, and is one of the fastest developing regions in the world. With the APAC region on track to become one of the world leaders in the digital economy, it's clear that other areas such as AMER and EMEA are yet to catch up.

The number of available learning technologies is growing year after year, with organizations using 14+ different and autonomous tools. And it will be even more connected to the wider technology ecosystem, by enabling learners to leverage Microsoft Office, collaboration tools, and knowledge management tools as part of their learning experience.

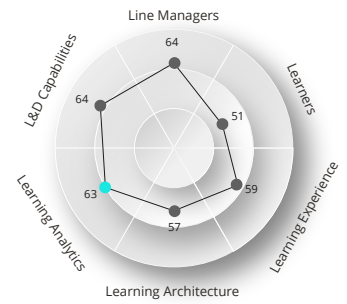
The Learning Architecture dimension is fundamental in enabling workplace learning, which, in effect, can boost upskilling and reskilling strategies. We expect this dimension to rapidly progress, as many organizations have accelerated their investment in learning technology during the pandemic.

6. Learning Analytics

Learning Analytics is a highly rated dimension of digital learning maturity. This is essential because performance data needs to be thorough, accurate, and gathered systematically. This can provide organizations with a comprehensive view into the business impact of upskilling or reskilling, with long-term value.

The report reveals that this dimension scores in the upper-intermediate stage, with an average of 63. Of all the job functions, HR and L&D staff feel most positively about their learning maturity in this area, reflected by a joint score of 64.

Data analytics provides L&D with the opportunity to measure, collect, analyze, and report on learning initiatives, to understand and improve learning. The increasing amount of data has forced organizations to invest in data analytics capabilities, as L&D has been a slow adopter but has now embraced Learning Analytics as a level for impact and efficiency.



Learning Analytics is often perceived as complex and laborious by learning practitioners, but it can be simplified by systematically defining KPIs at the start of each learning initiative. Without KPIs, it's impossible to measure learner progress and the effectiveness of the learning initiative. With them, however, organizations can measure and report on key areas like engagement, impact, and costs at the individual, team, or company level.

Many CrossKnowledge clients have identified Learning Analytics as a key dimension: partly to ensure that stakeholders are informed adequately on learning investments and partly to improve the personalized learning offer to boost skills acquisition. Our survey results show that large organizations with 50,000+ employees score higher, which could be explained by the fact that they are more likely to have expert capabilities in the field of learning analytics.

Key Takeaways

Responding to the ‘new normal’

First and foremost, it's clear that the COVID-19 crisis has led to much higher expectations for digital learning, with a huge increase in demand for innovative digital learning solutions. As hybrid working is now considered standard practice, it's never been more important for businesses to raise the bar in terms of their digital capabilities and learning maturity.

A shift for L&D departments

To elevate L&D from a transactional role to a strategic one aligned with the business, the function will need to transform rapidly. This need is accelerated by multiple developments in L&D that have substantial impact on the function: the evolution of learning technologies and digital learning formats; the opportunities offered by learning analytics and artificial intelligence; the shift from in-person learning to online, blended, and on-the-job learning; and the rising importance of learning sciences.

Regional factors

Our findings show consistent disparities between our three regional focal points (AMER, EMEA and APAC). The most noticeable trend is that the APAC region has significantly higher satisfaction levels across the board in terms of employees and their experience of digital learning maturity. This could be due to several factors, chiefly that this region is simply investing more money, time, and resources into what has now become a hugely necessary economy. With more Asia/Pacific countries and cities looking to nurture future talent for their knowledge economy, the race to gain leadership in a new digitally empowered workforce is likely behind such high overall satisfaction scores.

This evolution will not be easy, as it will require L&D leaders and professionals to let go of outdated knowledge, skills, and learning formats and acquire new skills. In addition to building new capabilities, the L&D community will need to embrace the tools, frameworks, and models that have emerged as best practices over time, in pursuit of the following:

- More efficiency within an organization's skills landscape with optimized costs, increased speed, flexibility, and scalability
- Better alignment with strategic business priorities and operations at local and global levels
- More effective skills-building with a highly personalized and engaging learning experience

For more detailed insights on how to improve your digital performance, download one of CrossKnowledge's tailored online toolkits. These provide you with practical steps to enhance your digital maturity, across all six dimensions.

Choose from these toolkits:

- Enhancing L&D capability
- Boosting line managers' involvement
- Enhancing learners' motivation
- Enhancing learning experience
- Enhancing learning architecture
- Enhancing learning analytics

