Best Practices for Learning & Development: Findings from a Cross-Industry Survey

By Expertus & Katrina Baker

New analysis on key learning trends, commonalities and strategies that lower corporate training costs and raise learning's outcomes

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Introduction

Today's global organizations spend up to $100 million each year on training. While many are looking for ways to stretch thier training dollars, new ideas on how to save their training departments' time and money are hard to find.

Thankfully, we've compiled the latest best practices for improving learning and development efficiency in this research report. It's based on a new survey we did with respected LMS Consultant Katrina Baker covering 329 training departments from a broad cross section of corporate industries and sizes.

Read on to learn how to do more training, in less time, with less dollars.

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Corporate Learning Budgets, Goals and Technology: 4 Key Challenges

In reviewing the findings from our survey, what struck us right away were the common problems and frustrations that learning organizations have, regardless of size or industry served.

1 **Everyone's training goals are different**—Not only does every learning org have differing goals for their training programs, but these goals continually change based on where they are in their learning and development lifecycle. Smaller companies just starting out may only want to address one basic learning need, such as compliance. Whereas larger, more established learning departments may want to focus on growing engagement through new learning technologies such as gamifcation and mobile reporting.

2 **Size breeds creativity**—Our research revealed that while all companies wanted to ensure that learning is properly marketed and engaging, smaller organizations had to be more creative with their training programs and plans. The takeaway? Larger/older companies should remember to tap into their learning and development creativity, while smaller companies should strive to add more best practices into their training endeavors.

3 **No budget is large enough**—Everyone struggles with their training budget, period. If it's small, you're looking for ways to maximize what you have. If it's big, and you already have everything in place, there are always new ways to fill emerging learning needs. We're all in the same boat.

4 **Still working on learning tech adoption**—One of the survey's biggest surprises is that many organizations, particularly smaller companies, are slow to adopt learning technology. It's still seen as "a luxury" even though learning technology is now more affordable and can yield significant cost savings and payoffs for organizations of any size.

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Corporate Training Tips and Tricks: Save Your Money and Prove Your Worth

To get more in-depth anaylsis of corporate learning challenges, and easy strategies for overcoming them, read Katrina Baker's new book "Corporate Training Tips and Tricks: Save Your Money and Prove Your Worth".

It includes findings from her joint survey with Expertus, as well as her own expert insights, advice and best practices.
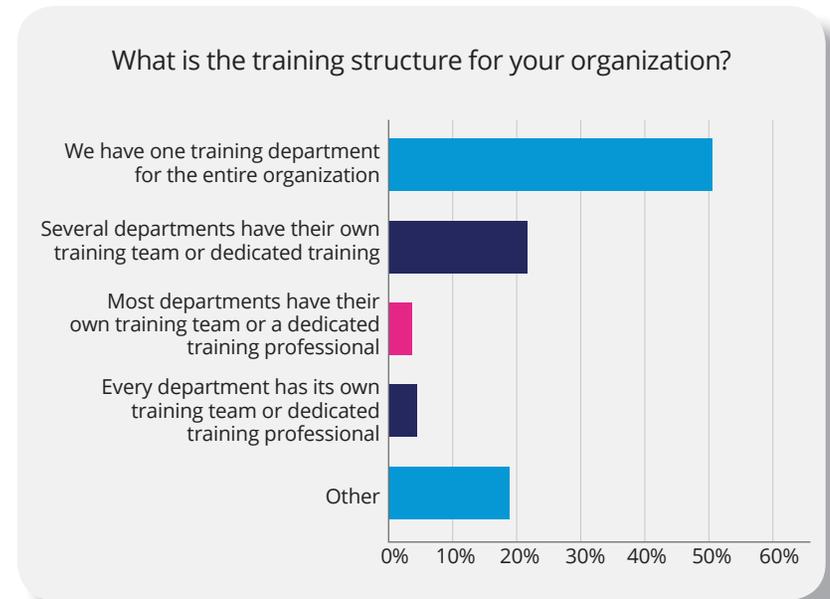
Analyzing the Trends: Training Structure, Type & Focus

Training Structure

An ongoing challenge for many companies is developing a solid, productive structure for their training organizations.

The biggest argument here is whether it should be centralized or decentralized. And this debate causes a lot of disruption and wasted expense as companies typically swing back and forth between the two extremes. *(Note: The graph here shows about a 50/50 split between centralized and decentralized.)*

What is the training structure for your organization?

We have one training department for the entire organization

Several departments have their own training team or dedicated training

Most departments have their own training team or a dedicated training professional

Every department has its own training team or dedicated training professional

Other

0% 10% 20% 30% 40% 50% 60%

As far as a centralized structure goes, half of the respondents had one centralized training hub with local departments or delivery:

"One company-wide training department in HR, but larger departments additionally have (their own) training teams."

"Corporate training unit at HR and training sections at each department."

"Corporately driven with training facilitation in operations."

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The other half had different versions of a decentralized structure. Some with two organizations serving unique learning audiences or content:

"

We have two training organizations that support Sales and Operations respectively. There is a strong partnership between the two departments to maximize cross-departmental L&D efforts, and minimize duplication.

There are two training departments. One caters to all Technical, Domain and Professional trainings and the other caters to all Soft Skill and Leadership trainings.

Two training functions, one covers agents and one covers corporate. Several departments have their own training function that covers job specific training.

We have two training teams—one for revenue generators and the other for operations.

We have one training department for internal and one for external.

"

There was also a large group, 20 percent, that specified "other"—which generally meant a completely decentralized structure or no training department:

"

Our training is individualized to end user needs.

We don't have a training department or function. Each department is responsible to procure, create and deliver the required training to meet the goals for each year.

This is an area that we are trying to build. Currently we work in silos, no structured training HR team in place.

We don't have a dedicated training department. Employees bring suggestions to HR who then researches and makes recommendations.

Most departments rely on SMEs.

Each department head acts as training director.

We have two individuals supporting corporate learning.

*No one really admits there is a training department.*

"

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If you had to pick a winner between a centralized and decentralized training structure… based on the survey's findings, a mixed-model dedicated to serving individual learning audiences' needs is the most common and successful.

Training Type & Focus

When it comes to what type of training learning organizations are offering, there was much less debate. More than half of respondents said that 40 percent or more of their courses are mandatory.

What percentage of your courses are mandatory for employees?
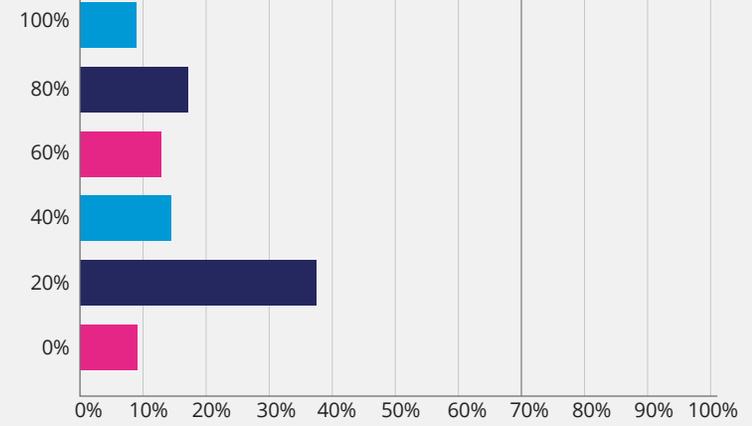
As for whether or not learning organizations allocate 40 percent or more of their training towards leadership development, the field was once again split with 45 percent using that or more, 43 percent using less and 12 percent offering no leadership training.

What percentage of your training program is used to develop new leaders?

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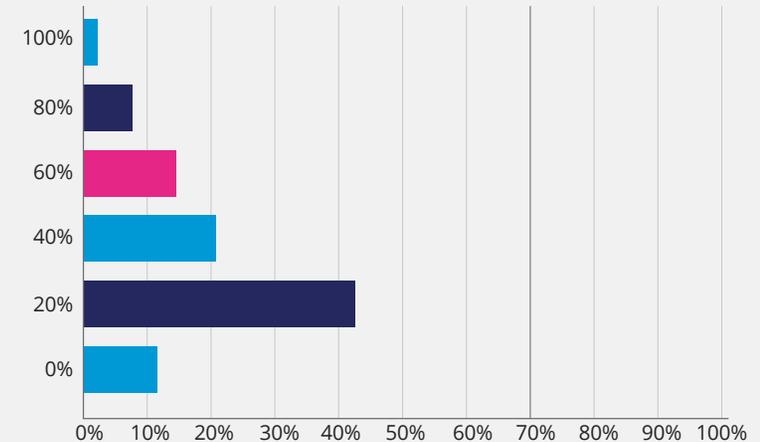
Tips & Tricks for Training Content Creation

Now that we've covered how training organizations are structured and what kind of learning they're offering, let's review the actual content. Specifically who's creating it, how they generate new ideas and how they streamline the course creation process.

According to our poll, nearly 60 percent of training departments come up with the ideas for new learning content. This could be good or bad.

Does your training department generate the majority of ideas for new training content?
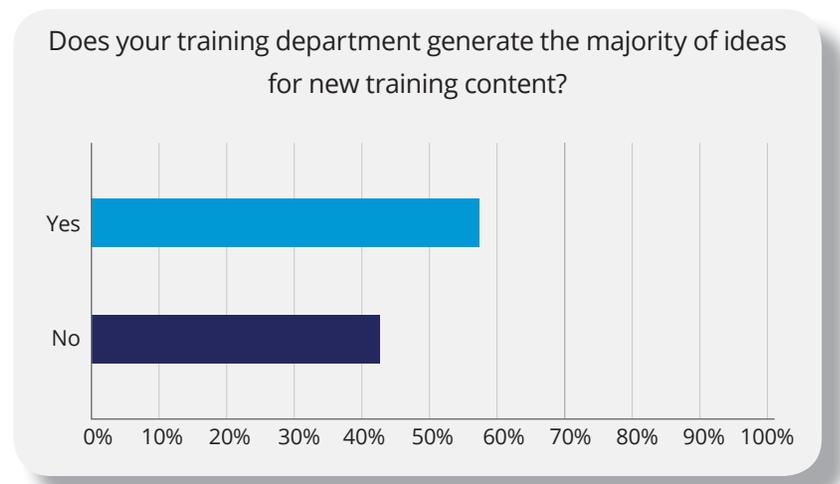
We're seeing a trend among learning leaders that want to connect directly with learners to find out what training they feel will be most helpful. Leaders no longer want the training department to be seen as an "ivory tower" (a university-style organization) that's disconnected from the bottom line needs of their organization and its many business units.

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Training Content Tips & Ideas

The responses to our next survey question supported this trend of tearing down learning and development's ivory towers.

When asked how their training department generates ideas for new training content, a large majority, around one-third, replied that they sourced employees, customers and business units.

"We do focus groups and interviews throughout the company to learn what people need and where additional training is required."

"(We) work with other departments to identify areas which require training, and develop those courses. For example, as a pharmaceutical company, we receive customer complaints. Identifying from where in the process the problems that caused the complaint originated, training can be developed to reduce the possibility of the error recurring."

"Our training department always has an open door for requests either through one-on-one meetings or our online survey in our LMS."

"Training content is provided by collaboration from other departments that deal directly with the client. Also, from feedback provided by the client themselves when doing one-on-one trainings or based on monthly webinar attendance."

Top 8 Sources for New Training Content (in order of priority)

1. Employees/Customers/Business Units

2. Business Needs/Skill Gaps

3. Research (Surveys/Workshops/Brainstorming)

4. Management

5. New Products/Services

6. Performance Goals/Outcomes

7. Compliance/Regulations

8. Market/Industry Trends

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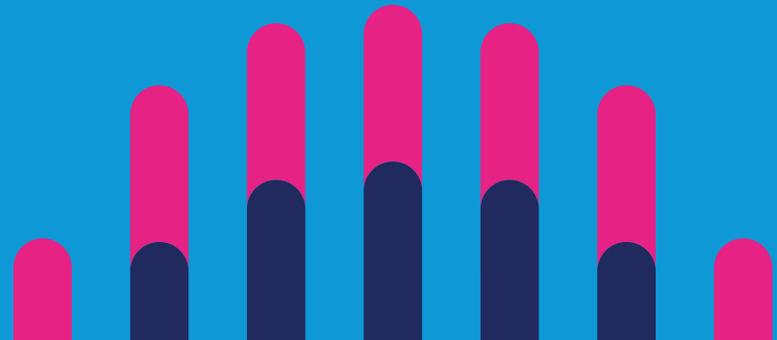
The next most common area for finding new training ideas was a close tie between identifying core business needs/skill gaps and gathering research from a variety of sources.

"

It's driven by the business needs and our partnership with the business leaders. Our content should be relevant and provide a solution to a specific business need and have correct business metrics associated with the content to determine its effectiveness.

Needs analysis with the business, and reviewing business goals to see where there could be skills gaps.

Focus groups, needs assessments, staff expertise, advisory committees, industry trends (and) employee engagement surveys.

Industry experience, feedback from learners, research, regular attendance at seminars and exhibitions, internet contacts (and) professional association contacts.

By arranging workshops, through brainstorming sessions…(and) analyzing the market trends.

"

It's interesting to note that brainstorming was mentioned as the most popular form of research. Collaboration seems to be a success factor for many of today's top learning organizations.

A unique suggestion for training topic research was using learning blogs.

"One method we use in generating ideas is having each member of the team subscribe to learning blogs. Some examples include Radip eLearning, Cathy Moore, eLearning Brothers and eLearning Industry. Ideas from those blogs are shared among the team."

Another interesting commonality was a hybrid method for developing new learning.

"Ideas for new training content are generated by arranging workshops, through brainstorming sessions, continuous interaction with business leaders and SMEs, analyzing the market trends, etc."

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"Benchmarking and keeping an eye on developing development trends and topics. Aligned with and from the business strategy and needs. (And) linked to succession and talent acquisition plans."

"Our data sources are multiple. We get 30 percent of our input from the performance appraisal forms as part of the development plans, 30 percent out of the key goals for the year, 10 percent from our succession planning exercise and the rest from our values."

Lastly, many departments focused on problems, gaps and performance to build new content.

"Typically we look for problems and create training to avoid repetition. Also, we look at opportunities to excel and create training based around how to do that."

"We use gaps in the competency model for the organization and choose from there based on priorities and values."

"If a drop in productivity or increase in quality or safety issues is noted, training is developed to improve those topics."

All told, learning organizations are becoming much more inclusive in training development—reaching out to learning groups and employing a variety of methods to enrich course relevancy, value and results.

Tricks for Streamlined Course Creation

Since learning organizations create so much content, chances are you're looking for a few tricks to make the course creation process run more smoothly. Following are the survey's best ideas.

1   **Get buy-in early**—don't forget to scope documents upfront

2   **Find a way to make it fun**—have the creators do things they like to do; "treat it like a show"

"Understand that the digital world is where learners spend most of their time. Training cannot look like a poor cousin of the real world, it needs to be aesthetic, stylish and intuitive. If not, it will be forgotten like half the apps on their phone. Make it pretty, use videos not articles—treat it like you are competing with all the other content they have access too."

3   **Dedicate time to the study and planning phases**—time spent planning and reviewing saves time developing

"Prepare. Prepare. Prepare."

"Create a content outline for the training that meets the various learning preferences (auditory, kinetic, visual, etc.)."

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4 **Secure SMEs, business sponsors and content experts first**—make sure they're passionate about learning (never force people to train) and take the lead

"Always get a business sponsor to keep the training 'real' so that it doesn't veer away from the original purpose."

5 **Focus on simplicity**—keep the training succinct, write in plain language, "streamline content ruthlessly" and don't overreach

6 **Test, review and continually reevaluate**—have a transparent workflow

"Simple but old approach: test concepts and ideas out, develop a fully formed proposition from a trial, get participants involved in pre and post reviews (and) use alums for further ongoing development."

7 **Create meaningful and measurable objectives**—ensure the content and activities map directly to those objectives; create "walk aways" on the front end

8 **Use ADDIE, Instructional Design and/or action mapping**

"Have (a) dedicated competency team who would take care of course creation. (Don't) offload this to trainers who are already into training delivery."

There was also a lot mentioned about collaboration…

"We are open to all ideas. Doesn't matter that we can't fly 800 people to Cambodia. We put it on the board, consider what makes sense and what to retain in the design. We may not fly those 800 people to Cambodia, but we will probably bring the core of 'why' we would do it to the final program. This creates an atmosphere of immersion—conditions where many people are reliant on one another to provide a novel experience."

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If you're not using storyboards, you may be missing out on a very effective technique. It was one of the survey's most popular suggestions:

"Storyboarding using PPT is a very effective way for SMEs to support the effort."

"We meet our SMEs with storyboards. We do not start building in storyline until the outline is agreed on paper. Then we build and show the first draft to the SMEs. There are less corrections to be made and they are not as stuck on the visual. They get distracted by the visual, I find, and we lose time."

"We create our storyboards in Google Docs so my international team can easily collaborate and keep track of revisions and change requests."

Quick Course Creation Advice

- Ask why it's important and what's the expected action

- Information is not instruction

- Continuous communication is key

- Pay attention to detail

- Don't try to make it perfect from the start

- Set a firm delivery deadline

- Is it training or will an infographic work?

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Lastly, here are a few final words of wisdom on collaboration to consider:

"Regular checks with key stakeholders prevents wasted time. Regular input from employees can point out pitfalls and remove unnecessary/ boring content. Testing on real employees and physically being in the room as they interact with content will teach you everything you need to know about the course (and many things you didn't want to know)."

"Start at the top. Give mini training sessions to executive management to make certain acronyms and key concepts are communicated."

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Top Challenges in eLearning Delivery

Now that we've addressed content creation, let's move on to the challenges and solutions for online learning delivery.

What is your organization's biggest challenge in delivering online learning?

- Other — 31%
- Budget constraints
- Implementation knowledge among internal teams — 20%
- Implementation experience among internal teams — 6%
- Timing constraints for implementation — 4%
- Lack of senior management support — 16%
- Implementing the tracking of employees' activities — 7%
- Knowing which activities of employees to track — 8%
- Reporting challenges — 3%
- 5%

As you see, the two largest challenges (36 percent) are budget and time constraints—which are basically the same thing. ELearning is expensive to create, maintain and update, especially if you do it right. So there needs to be a middle ground.

Also, we can't put everything into an eLearning form. And if you add in the element of wanting eLearning to work on small mobile screens, the cost continues to climb. Thus, we'll continue to need to find creative ways to reign in eLearning budget and time expenditures.

ELearning tracking and reporting is a different story. Most respondents have a good handle on it, probably due to advances in LMS reporting tools. And online learning implementation among teams seems to be a relatively low concern—which indicates the quality of eLearning is on the rise.

Other eLearning Challenges: Trending Survey Answers

- Disconnected learners/poor engagement/"boring" programs

- Enterprise, LMS and technology limitations

- Lack of content or online learning access

- Insufficient marketing

- Learners can't find time to view it
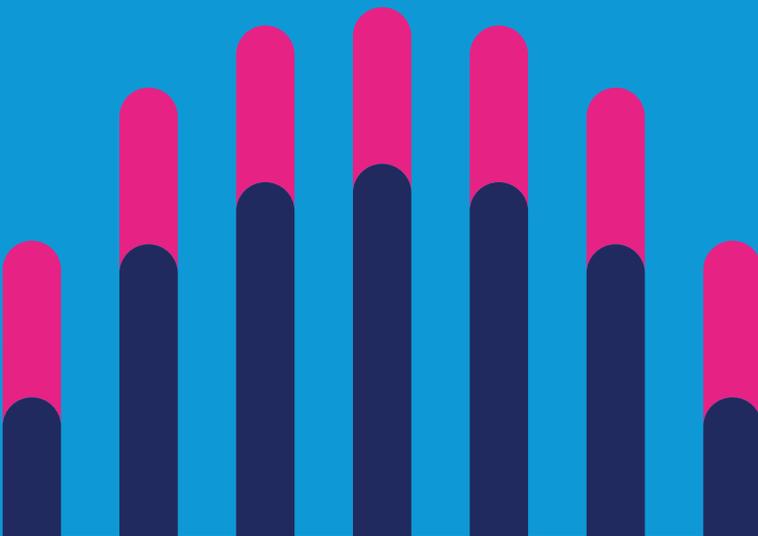
Successful Techniques for Introducing Training

While we may still be ironing out the best method for delivering learning, the survey's respondents had numerous best practices for introducing new courses and training initiatives.

Here's a breakdown of the most popular techniques:

Pilot Programs

"'Slither in'...train a few, then it spreads with word of mouth...or do a pilot."

Making Training Sound Fun

"I am positive about what I want to train and make it sound interesting and important."

"(We send) funny teaser videos to illustrate the current situation and how this training can help them better perform at work."

Offering Certificates

Correlating Training to Performance

"(We) advertise as to how it can enhance the learner's productivity and/or upward mobility."

Social Media

Advertising/Newsletters/Emails/Intranet

"Since our employees are spread across five countries, most of our launch initiatives are virtual. We've done 20-second animations sent via emails, online quizzes and some email notifications."

Competency/Non-conformance Analysis & Tracking

Gamification, Contests & Incentives

"(We use) gamification and competition between associates, teams and geographical divisions within the company."

"Gaming...word gets out that there's a new 'game' that I'm rolling out for training."

Training in Staff Meetings/ Town Halls

"There is no magic formula— communication, communication, communication."

Personalized Invitations/Invites from Management

"By (sending) invitations from a Senior Leader, it makes the training seem like a privilege."

Engaging Sr. Leadership

Webinars, Videos & Virtual Introductions

"Introduced short webinars for our HR managers to upskill them on forthcoming initiatives...(with) flexibility in when they can attend."

"We send out 'hype' videos on our Jive site and let users know it is coming to build interest."

"Micro-learning video—a 1-2 minute 'commercial' emailed out to generate buzz."

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There was an interesting balance between "old school" methods, such as newsletters and email blasts, and emerging practices, including gamification and micro-learning videos. We expect the latter to continue to grow over the next few years.

"(We use) a multiple step approach—announcing the training on team calls, creating LMS pre-work, staying in constant touch with the field, having the training session and making sure to follow-up afterwards with parking lot answers, as well as offering a recording of the training and additional documentation (FAQs/QRG)."

Of course, open houses, road shows and lunch and learns were still common activities. A couple of unique best practices were to:
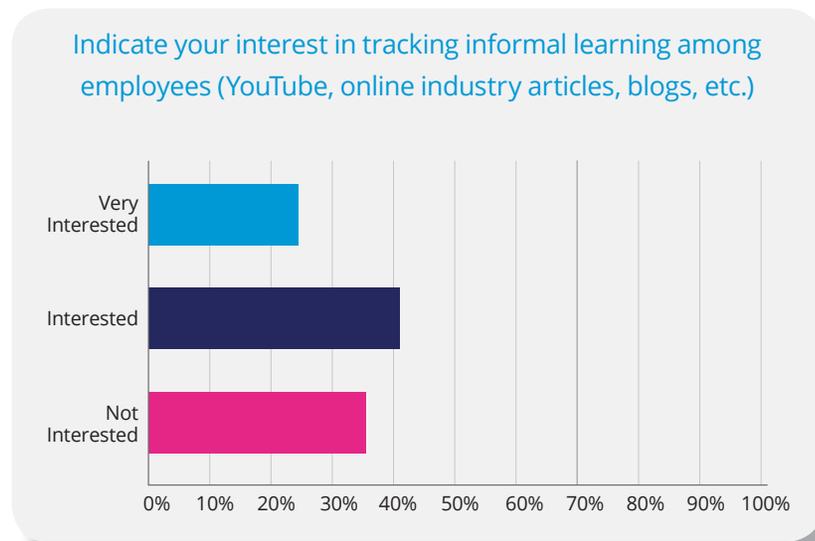
1. Limit attendance for 'optional' courses to generate word of mouth and buzz

2. Implement a daily question system from the LMS—"It is a quick, easy and fun way for training to be given"

And although many suggested making learning mandatory, there were a few that took the opposite approach—allowing employees to make their own training choices. *(Note: This is a trend we have heard several analysts like Elliot Masie and Craig Weiss voice.)*

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To Be or Not to Be: Tracking Informal Learning

Tracking informal learning is something that the majority of companies want to do, but just a few are doing it well or getting a big impact from it—mainly because it's so hard to control. Some would argue that you almost need to be hands off and "just let it happen".

Here are where interests lie across our surveyed group:

Indicate your interest in tracking informal learning among employees (YouTube, online industry articles, blogs, etc.)

Very Interested	
Interested	
Not Interested	

0%   10%   20%   30%   40%   50%   60%   70%   80%   90%   100%

How to Lower Learning & Development Costs

Revisiting one of the biggest concerns we covered at the beginning of this report, everyone—regardless of company size or industry—is looking for ways to stretch their budget.

In our last survey question, we asked participants to reveal ways their company lowers learning costs and the expenses associated with learning and development labor.

Outsourcing vs. Internal Resources

Although several people cited outsourcing as a way to cut costs, the vast majority reported that they were doing the work internally with smaller, smarter teams:

"Moving from event based programs, which require facilitators, to online. Also, moving from vendors to in-house development."

"Increasingly hire those with more knowledge and experience."

"(We use) a small in-house specialist team complemented by a good pool of deliverers."

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Classroom Alternatives

Many also found ways to minimize classroom-based training time, which can be costly. Here are a few of their best suggestions:

• Have learners read-ahead/view-ahead classroom materials

• Offer training in the path of the work; on-the-job training

• Use training player/coaches—embedding trainers within the division who train and have functional responsibilities

"Every shift, every associate completes 3-5 minutes of online training bursts, in addition to the classes or other methods of training delivery they experience. This allows retention of content to be very high, helping us reduce the need to hold costly training classes or retrain when people 'don't get it' the first time around."

Online & Mobile Learning

In line with reducing classroom-based training, a lot of learning orgs are moving to mLearning and eLearning because of their time- and cost-savings benefits:

"(We're) creating online and virtual sessions/mobile learning; (they) minimize time away from the operation, travel and labor costs."

"We record some classes to share with other employees more broadly. We use internal SMEs to teach the classes."

LMS & Learning Technology

With more employees working remotely and having less traditional work hours to train, adopting an LMS or other form of learning technology was another trending way to improve training efficiency:

"(The) LMS is available 24/7. Employees can do required continuing education for licensure or other learning interests at home in non-work hours."

"We developed a process for associates to access the LMS from home (with) mandatory programs qualifying for pay. Previously all LMS programs had to be completed at work which caused incidental overtime costs."

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5 Strategic Ways to Cut Training Costs & Raise Learning's Value

1. Open learning to external partners and customers to generate training revenue

2. Correct training errors, waste and oversight with regular trend analysis

3. Tailor content to each job role (reduces employee training time)

4. Keep training nimble, using avenues beyond the classroom (LMS, Salesforce Chatter, email, webinars, etc.)

5. Repurpose content, buy instead of build and/or use vetted free training

Concise, Targeted Learning

There's also something to be said for keeping training short and to-the-point:

"Provide short learning modules of 10 to 15 minute duration. Reduces overtime. Improves attitude. Ensures clear and concise objectives that can be measured."

"If you can't afford it, don't run it. Look for a cheaper alternative. Better training of first line managers is key."

"The answer is simple—short training sessions."

"We spend the amount of time needed on development to meet the need. So a course does not always have to be full featured with all the bells and whistles. Make it work, make it relevant and don't add fluff if it's not needed."
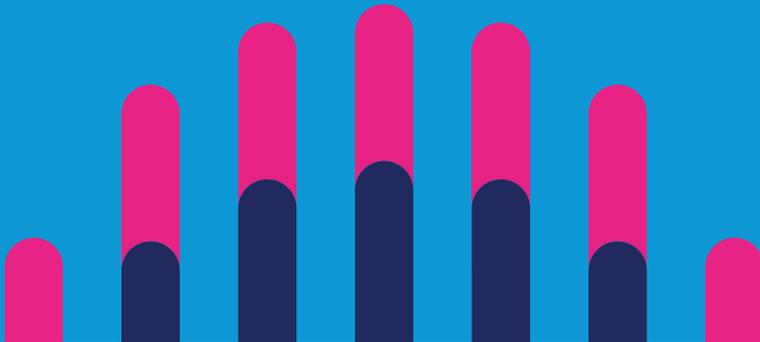
Page Turning Content

Once again, creating exciting content was a successful technique for overcoming learning efficiency issues. One respondent was able to shorten or cut ILT by "turning 'boring classroom content' into engaging eLearning pre-requisites." Another produced "page turner content" that improved adoption and productivity outcomes.

5 Training Fails: How to Sabotage Learning Efficiency

While many survey respondents had positive training experiences and advice to share, following are a few tips they gave on what not to do—i.e. their best training fails:

1. Devolve the training responsibility to managers

2. Decentralize learning and development with specialized trainers for each department

3. Ignore the fact that training and development are needed; "every soul for itself"

4. Use a lean staff wearing multiple hats

5. Train only a limited amount of people

Final Cost-Saving Tips

Even though there wasn't enough of these responses to deem them trends or best practices, they sparked our interest and may prove of solid value to your learning organization:

- Use a team/buddy workflow approach

- Offer training on Monday or Friday when most travelers are in house

- Provide work time for courses, instead of requiring additional hours

- Make training a competition

- Send one trainer to a conference and then have them educate your other trainers

- Invest in good planning and offer numerous training reminders

Summary

"Everyone's all in the same boat." That's the best way to summarize the findings of this learning and development efficiency survey. Regardless what industry a company's in, whether they have one corporate office or they're a major global player, everyone struggles with the time and cost expenditures for effective learning and development.

There are, however, unique ways training departments are fighting—and winning—this battle. And hopefully the insights provided here will get your learning organization one step closer to winning its training efficiency war.
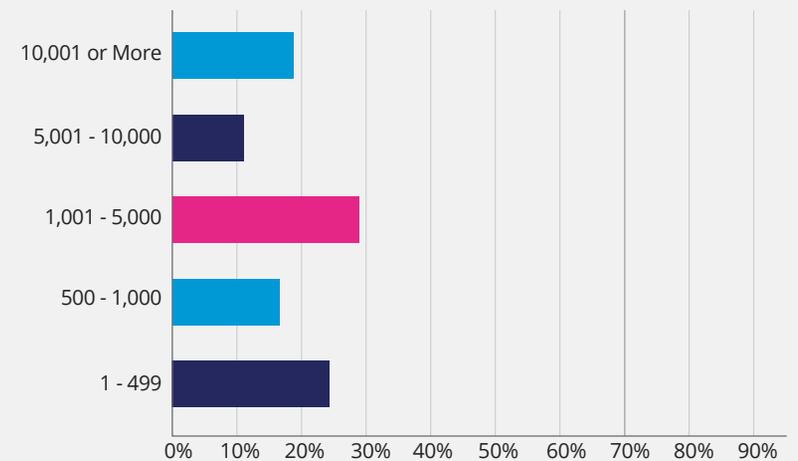
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Addendum

Survey Background Information

Industries	
Other	21.57%
Computer Software and Services	11.37%
Health Care Services	9.41%
Manufacturing (excl. Automotive Manufacturing)	8.24%
Consulting or Business Services	7.06%
Banking/Finance/Financial Services	5.88%
Insurance	4.71%
Transportation	3.53%
Aerospace/Defense	2.75%
Energy Production (incl. Oil, Gas, Natural Gas, Electricity) (excl. Mining, Utility Services Delivery)	2.75%
Construction/Construction Materials	2.35%
Hotels/Tour Operators/Leisure Industry	2.35%
Retail	2.35%
Health Care Products (incl. Medical Supplies, Devices, Equipment) (excl. Pharmaceuticals/Drugs)	1.96%
Pharmaceuticals/Drugs	1.96%
Real Estate	1.96%
Telecommunications	1.96%
Chemicals	1.57%
Biotechnology	0.78%

Electronics (other than Computers)	0.78%
Food Production (excl. Restaurants)	0.78%
Restaurants	0.78%
Utility Services/Delivery	0.78%
Wholesale	0.78%
Automotive Manufacturing	0.39%
Computer Hardware	0.39%
Media	0.39%
Mining/Drilling/Metals	0.39%
Beverages	0.00%
Tobacco	0.00%

Number of Learners in Surveyed Organizations

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About Expertus & ExpertusONE

As a trusted learning technology partner, Expertus has built ExpertusONE— the most powerful and intuitive LMS for training any learning audience. The enterprise-class system engages and empowers learners and admins, enhances learning effectiveness and enables distributed learning at scale. Learn more at www.expertus.com.

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