

Enterprise Learning Leaders Sound the Alarm: AI, Skills & Complexity

Learning industry leader review of the latest research

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Session Agenda

- Setting the stage
- Research review
- Navigating AI, skills & complexity
- Your questions

Housekeeping:

- live session being recorded
- please drop your questions into chat

Our Focus Today

- How large enterprise learning leaders are approaching the increasing complexity of their learning & training environments
- What large enterprise learning leaders say matters most when considering their learning system options
- Building a modern enterprise learning strategy, inclusive of skills, AI, and experience across audiences

Our Speakers



Ramesh Ramani
CEO ExpertusONE



David Wilson
CEO Fosway Group

Research Review

Fosway's key findings of large enterprise learning



Europe's #1 HR Industry Analyst

Founded 1996

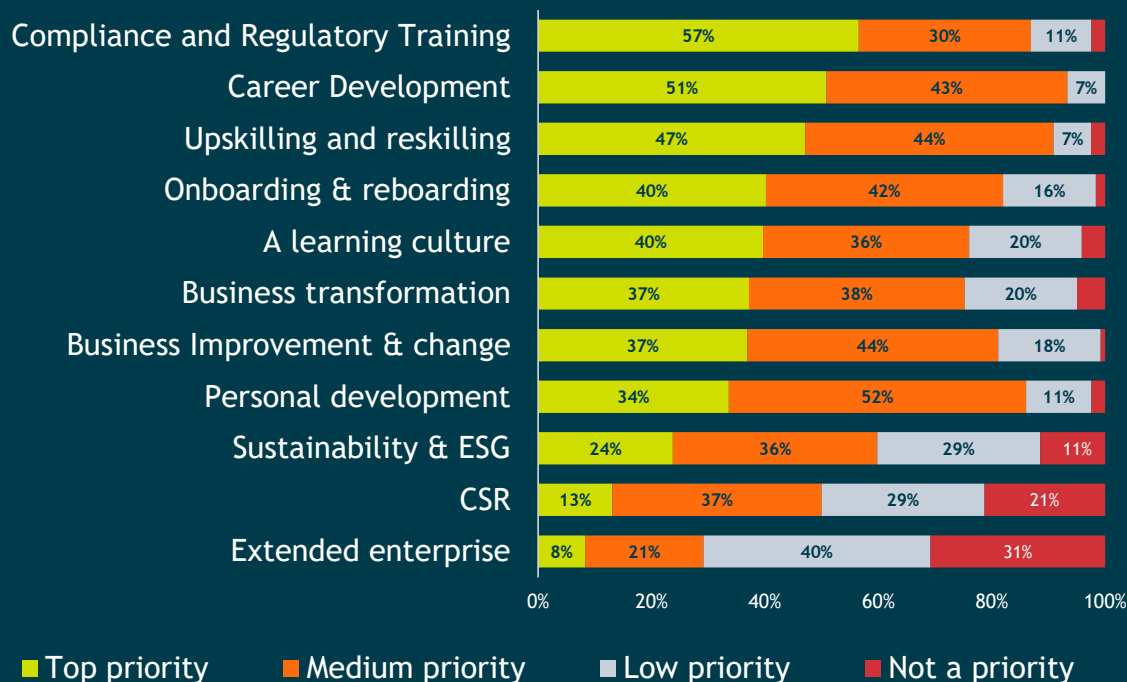
In-depth corporate research on Next Gen HR, Talent and Learning

Analyst & advisory services to more than 3,000 European & International HQ multi-nationals and corporates

Independent vendor research and EMEA market commentary



What are the top priorities for your learning strategy for the year ahead?



Compliance continues to lead L&D priorities for 2023, but career and upskilling/reskilling are close behind

Whether we like it or not, annual compliance training is still the #1 driver of learning activity and continues to dominate with 57% of research participants highlighting it as their top priority for the year ahead. But Compliance Training is also changing and progressive learning teams seek to increase the efficiency and effectiveness of regulatory training by using adaptive, spaced, scenario-based learning techniques.

Global

- ▶ **In many countries, territories, markets and operating units**
 - More than just supporting many languages
- ▶ **Devolved structures and budgets**
 - Business: Different business units and brands locally managed
 - L&D: Local system administrator requiring specific permissions or limited access
- ▶ **Different regional regulations and requirements**
 - 'Follow the sun' support
 - In local languages and time zones for both implementation and business as usual (BAU)

Complex

- ▶ **Hierarchical/structural complexity**
 - Business structures, operating models, functional structures and organisational hierarchy
 - Supporting business complexity e.g. Manufacturing & Pharma v hospitality & retail
- ▶ **Large number of job roles (and therefore learning needs)**
 - Complexity of the makeup of audience and learning
 - Large variation in job families, functional roles, matrix reporting structures, and specialist business related needs E.g. HQ (small staff many roles) v Retail Stores (large staff - few roles)
- ▶ **Devolved management and ownership of L&D**
 - budget, learning activities and staffing needs E.g. devolved regions, market units, brands ...

Learning Sophistication

- ▶ **Diversity of the audiences**
 - Desk v deskless workers
 - MBAs/PhDs v front-line operations
- ▶ **Depth of compliance requirements**
 - Regulatory compliance to ensure employees are job fit
 - Business validation of compliance - linking with the workforce planning or building access
- ▶ **Management of the learning processes**
 - Ability to manage and configure at scale
 - Sophistication of management processes to support that scale
- ▶ **Aspiration of the business (knowledge economy)**
 - Approach to learning, how it supports the business

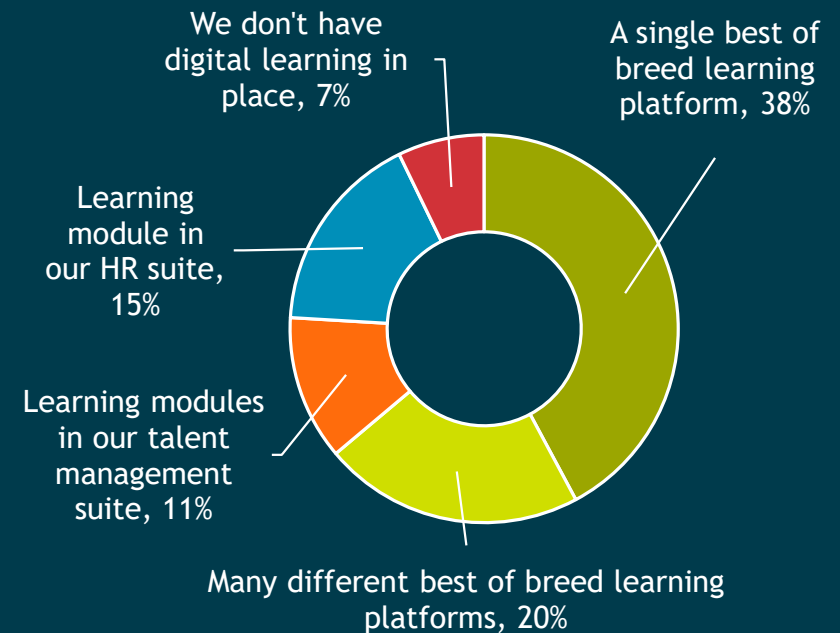
Note: Size is not the only criteria ...

- ▶ Complexity of organisation and sophistication in how learning is managed is important
- ▶ LS is not a tactical choice (department / audience), it is for the whole organisation
- ▶ Corporates typically understand if they need LEL, but mid-market vendors over-simplify it

Whole Organisation: Corporates may have more than one learning system

A large enterprise learning vendor will provide the **main strategic platform** across the whole organisation - not just one business unit, country or for one or two special projects or programmes

How does learning in your organisation fit with the rest of your HR technology infrastructure?



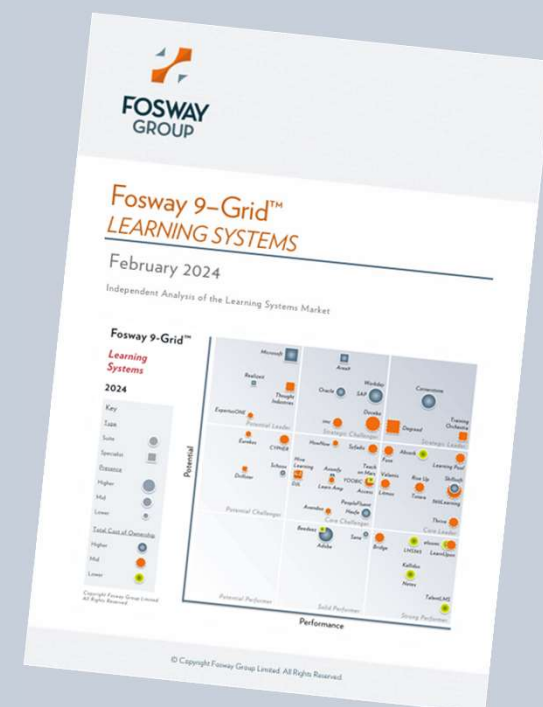
Learning Systems - An Evolving Picture ...

Learning Experience	Learning Management	People Development	Workplace Learning	People, System & Architecture
<ul style="list-style-type: none"> • UX/UI • Search • Personalisation • Rating & Feedback • Engagement & Marketing 	<ul style="list-style-type: none"> • Formal Learning • Learning Content • Manager Portal • Assessment & Evaluation • Analytics, Dashboards & Reporting 	<ul style="list-style-type: none"> • Defining & Managing Skills • Skills Assessment • Development Planning • Development Programmes • Managing Development 	<ul style="list-style-type: none"> • Workplace Learning • Collaborative Learning • Mobile Learning • Mobile Admin 	<ul style="list-style-type: none"> • Organisation & People Management • Extended Enterprise • Finance, Budget & eCommerce • Learning Ecosystem • Wider Ecosystem

The Fosway functional model for Learning Systems is updated each year, as is strengthening the research process and to assess the vendors. Vendor ratings and functional assessments are always built from scratch each year, and corporate experiences always are more important than vendor inputs.

Key Market Trends

- ▶ Skills are still the fuel of corporate talent and AI is its key to success
- ▶ But AI now eclipses skills and learning experience as the leading topic of conversation
- ▶ The rise of LX as a buying need, the demise of LXP as a buying category
- ▶ Frontline workers remain in the spotlight
- ▶ Vendor acquisitions have created a vacuum in the buying options for large enterprises
- ▶ ...



New Priorities: Learning Experience

- ▶ **Learning Experience is about much more than the “Look-and-Feel”**
 - Does it enhance the experience for the Learner as well as their learning outcomes?
- ▶ **Learning Experience for whom?**
 - LX for frontline workers is not the same as desk-based knowledge workers
- ▶ **Motives for learning matters in delivering a slick LX**
 - For many (or most) = Optimised LX is the simplest path to ensure they are able to do their job
 - Discovery-based learning and career discussions is often a minority sport
- ▶ **Personalisation and search must be contextual to all of these**

A large, stylized orange graphic of the letters 'LX' is positioned on the right side of the slide, partially overlapping the list items.

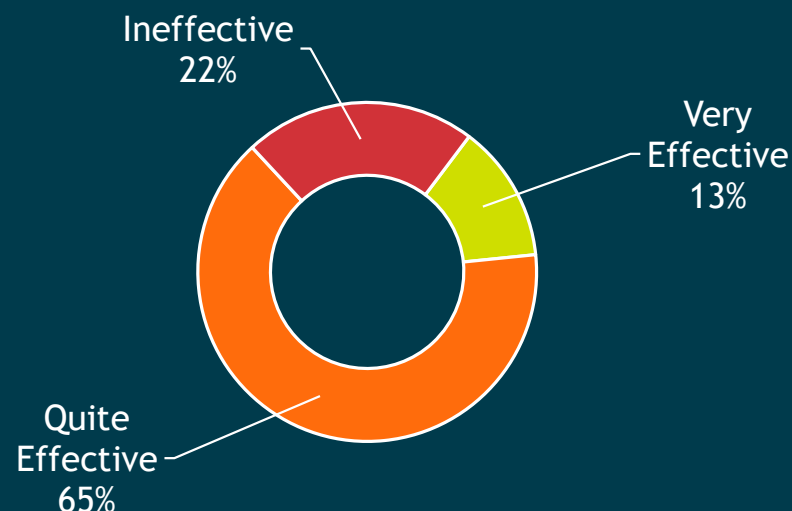
New Priorities: Skills

- ▶ **A key strategic driver for most companies and HR/L&D teams**
 - Moving from Roles to Skills as the foundational language of workforce capability
 - Aligning learning opportunities, content and programs to a skills taxonomy
- ▶ **But a topic that has been around for years in different guises**
 - And frequently failed in the past!
 - Will it work this time round? There is change with additional benefits of AI
- ▶ **There is no singular view on skills within a company**
 - Different views and use cases across recruiting, learning and wider talent processes
 - Multiple systems vying for control = most trying to own
 - L&D is often not in control!
- ▶ **Many corporates are not sure where to start ... and worried they will need to 'boil the ocean'!**

L&D teams struggle to be very effective at career and skills development, despite its strategic priority

Upskilling and career development is positioned well down the order as something that L&D teams do very effectively. They are placed behind compliance, personal development, onboarding, and learning culture. Only around 10% of L&D believe their L&D strategy is very effective at delivering career development and upskilling compared to 46% who believe their strategies are effective for compliance training.

How effective is your learning strategy at delivering learning for Upskilling and Reskilling?



New Priorities: AI

- ▶ **AI has been a topic in Learning for some time, but Gen AI has made it one of the biggest topics at almost every level**
 - AI-based learner engagement, chat, NLP, ...
 - AI-based personalisation, recommendations engines, skills tagging, search, ...
 - AI-based content generation, curation, synthetic media, ...
- ▶ **Already significant business impact in digital content production**
- ▶ **High expectations that AI will also:**
 - Be pivotal to Skills
 - Increasingly lead on learner engagement and LX
 - Accelerate and automate admin experience

What will LX and LM become in a world of Gen AI?

The main reasons for adopting AI are efficiency, effectiveness, productivity and personalisation

72%



Enhancing
learning
efficiency
(speed of
learning)

66%



Improving
learning
effective-
ness (depth
of learning)

63%



Providing
greater
personal-
isation

60%



Enabling
greater L&D
operational
productivity

50%



Optimising
learning
delivery

59%



Optimising
learning
design &
develop-
ment

In Summary ...

A modern learning ecosystem needs to fully enable:

- ▶ Learning experience, personalised recommendations and pathways
- ▶ People development, skills and development programmes
- ▶ Workplace, collaborative and mobile learning
- ▶ Innovation and new forms of learning

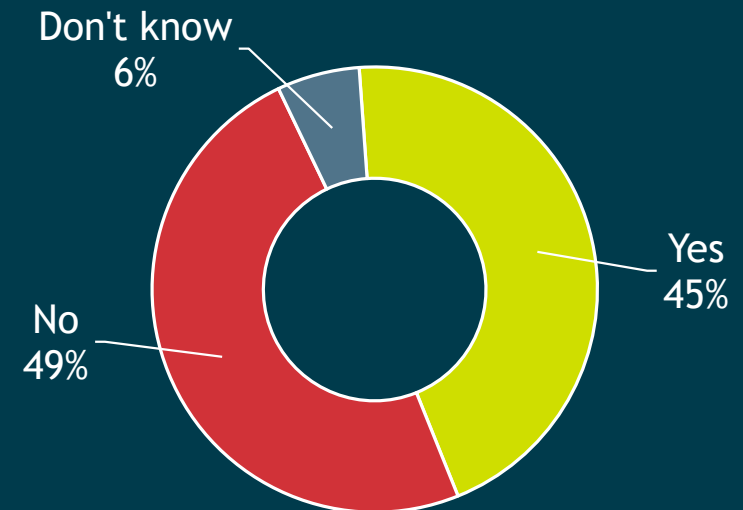
But old realities are still critical too:

- ▶ Learning management of diverse audiences
- ▶ Efficient administration
- ▶ Regulatory needs, compliance & reporting
- ▶ Connectivity to HR and wider ecosystem

Many Learning Systems have yet to consistently deliver a consumer grade learner experience for modern audiences

*Significantly, organisations using **best of breed learning platforms** are almost **2X more likely** to say their solution is fit for the modern workforce than those using a learning module in an HR Suite*

Do you think your current learning platforms are fit for the modern workforce?



Navigating AI, Skills & Complexity



Question #1

How can AI really start to be a game changer for enterprise learning and what should be the focus right now?

Question #2

What is the #1 mistake you see enterprises making when it comes to skills development and management?

Question #3

Where are learning leaders most likely to get tripped up in complexity and how can they avoid it?

Your questions



Thank you!

For more on choosing the right LMS, check out our guide:

Ten Enterprise LMS Features: The No-Fluff Guide