A Modern Approach to Corporate Learning:

Formalize Informal Learning

How to Institutionalize the “Informal” Into your Corporate Learning Programs

Josh Bersin, President and CEO

December, 2009
About Us

▪ Who We Are
  • Industry’s primary research firm focused on What Works® in enterprise learning and talent management.

▪ Research Areas
  • Enterprise Learning
  • Leadership Development
  • Performance Management
  • Career and Succession Management
  • Workforce Planning
  • Content Development
  • Strategic HCM Applications

▪ Offerings
  • Best-practices, benchmarking, and vendor research
  • Advisory services, consulting, workshops
  • Integrated membership program
WhatWorks® Membership Program

- Access to the largest collection of WhatWorks® research in learning and talent management
- Networking with hundreds of global, best practice organizations
- Decision support models and tools for strategy and implementation
- System selection tools, vendor profiles and product analysis
- Email and phone consultation with expert industry analysts
- Benchmarking metrics by industry and company size
- Annual IMPACT® research conference
- Hundreds of case studies in all major industries
- Profiles and analysis on hundreds of solution providers in systems, content, outsourcing and consulting
- Strategic consulting on all major talent and learning programs

For more information:
http://www.bersin.com/membership

Or send an email: info@bersin.com
Research for this Presentation

- Three years of research with more than 1,000 participating organizations
- Key practices for informal and social learning
- Case studies, examples, roadmap for success
- Enterprise Learning Framework
- www.bersin.com/hilp
Agenda

- Why is Informal and Social Learning so Hot?
- Defining the Elements of Informal Learning
  - Bersin & Associates Enterprise Learning Framework®
  - Learning On-Demand
  - Social Learning
  - Embedded Learning
- The Informal Learning Architecture
- Measuring Informal Learning
- How to learn more
Transformative Change and L&D

Business Climate
- Growth
- Globalization
- Expansion
- Product Launch

Organization Dynamics
- Merger
- Acquisition
- Restructure
- Reorganization
- New Leadership

Workforce Changes
- Millenials
- Teamwork
- Competitive
- Multi-Gen Workforce
- Retiring Boomers

Technology
- PC, Browsers
- Mobile
- HR Systems
- Social Networking
- Competencies
Top Talent Challenges

*Culture, Leadership, Skills now Top Priorities – Increased focus on Globalization*

What Are Your Organization’s Top Talent Challenges for 2009? (% urgent+important)

- **Creating a Performance-Driven Culture**: 63% (May 2009), 65% (October 2009)
- **Gaps in the Leadership Pipeline**: 66% (May 2009), 66% (October 2009)
- **New Skills for Product and Business Changes**: 51% (May 2009), 64% (October 2009), +23%
- **Skills Gap in Critical Positions**: 46% (May 2009), 52% (October 2009), +12%
- **Difficulty Filling Key Positions**: 39% (May 2009), 32% (October 2009), -18%
- **Managing layoffs and downsizing**: 33% (May 2009), 27% (October 2009), -13%
- **Low engagement or employee dissatisfaction**: 38% (May 2009), 33% (October 2009)
- **Retirement of Key Workers**: 29% (May 2009), 25% (October 2009)
- **Retention in Key Positions**: 27% (May 2009), 25% (October 2009)
- **Rapid Hiring Due to Growth**: 9% (May 2009), 6% (October 2009)

29% cited globalization as an urgent or critical challenge.

© Bersin & Associates, Corporate TalentWatch® Research, Senior HR and Business Executives, 10/09
The New Workplace

* A connected, specialized environment

---

**Today’s Workplace**
- Highly connected
- Dynamically changing in structure
- Specialized skills
- Multi-generational
- Undergoing leadership change
- Filled with contingent workers
- Globalized
- Womanized
Which learning approaches drive the greatest business value in your organization?

- On the job experience: 60%
- On the job mentoring, projects, rotation: 36%
- Coaching by supervisor: 33%
- Formal training - company provided: 28%
- Peers, friends, personal networks: 14%
- Formal training - outside provider: 8%
- User generated materials: 4%
- Corporate documentation: 3%

72% of companies believe their most valuable learning approaches are informal, yet only 30% of resources are focused here.
Need for Deep Specialization

- Organizations are flatter than ever
- Expertise drives competitive advantage
- Talent is developed through “deliberate practice,” standards, and reinforcement
- Specialized talent is more “mobile” than generalized talent
- Deep specialization is developed through “learning environments” not “learning programs

Building Competitive Advantage
What’s on the mind of L&D


- How do I improve our learning culture? 31%
- How do we implement learning "on-demand?" 27%
- How do I reorganize L&D for efficiency and effectiveness? 22%
- How do I implement Collaborative Learning programs? 21%
- How do I build expertise in the "new disciplines" of L&D? 21%
- How do I improve learning measurement and evaluation? 18%
- How can I benchmark my L&D organization to improve? 17%
Evolution of Enterprise Learning

Fundamental Change in Disciplines, Technologies, and Strategies

- Get Materials Online
  - Rich Catalog University
  - Instructional Design Kirkpatrick
  - E-Learning Get Materials Online
  - LMS E-Learning Platform

- Expand, Blend, Improve E-Learning
  - Learning Paths Role-Based
  - Rapid E-Learning Information vs. Instruction
  - Interactivity Simulation
  - LMS Enterprise Learning Platform

- Solve Talent Problems
  - Competency-Based Learning
  - Blended Learning
  - Search, Collaboration, Community Information Architecture

- Social Networking Informal Learning
  - Career Development Specialized Skills Leadership Development
  - Collaborative / Social Learning, Content Mgt, Rich Media
  - Learning Portal Blogs, Wikis, Twitter, Mobile, and Social Networks

We are Here

2001 | 2004 | 2007 | 2010
Agenda

- Why is Informal and Social Learning so Hot?
- Defining the Elements of Informal Learning
  - Bersin & Associates Enterprise Learning Framework®
  - Learning On-Demand
  - Social Learning
  - Embedded Learning
- The Informal Learning Architecture
- Measuring Informal Learning
- How to learn more
Big Picture of Informal Learning

How People Learn and Improve Performance on the Job

We need to optimize this

- Coaching On the Job, 70%
- Information in Support of Work, 20%
- Formal Training, 10%

Not just this

Bersin & Associates Research
High Impact Learning Organization 2008
The Challenge:

- Informal Learning Concepts
- Portals and Wikis
- Communities Of Practice
- Social Networking Tools
- Mobile Devices
- New models for instructional design
- New software Platforms
- Community Management approaches
- Corporate Learning culture
- Information Architecture
- New forms of governance and ownership

What Else?
The OLD Way…

Learning Programs

Approaches

Formal

Disciplines

Tools and Technology
Bersin & Associates Enterprise Learning Framework®

Learning Programs

Audiences and Problems

Informal

Formal
On-Demand
Social
Embedded

20%
80%

Approaches

Organization, Governance, and Management

Disciplines

Tools and Technology

Culture

Learning Architecture
# Bersin & Associates Enterprise Learning Framework®

## Learning Programs
- Leadership Development Management
- Career Development Technical Professional
- Onboarding Compliance
- Customer Service Sales
- Project and Process Product Knowledge
- Customer Education Channel Training
- Systems IT Skills

## Audiences & Problems
- Jobs
- Roles
- Competencies
- Proficiencies
- Preferences
- Demographics
- Geographies
- Business Problems

## Approaches
- **Formal**
  - Instructor Led Training
  - Virtual Classroom
  - Games
  - Simulations
  - Testing & Evaluation
  - E-Learning

- **On-Demand**
  - E-Learning
  - Search
  - Books, Articles
  - Videos
  - Podcasts
  - Learning/Knowledge Portals

- **Social**
  - Wikis, Blogs, Forums
  - Expert Directories
  - Social Networks
  - Communities of Practice
  - Conferences & Colloquium
  - Coaching & Mentoring

- **Embedded**
  - Performance Support
  - Feedback
  - Rotational Assignments
  - After Action Reviews
  - Quality Circles
  - Development Planning

## Disciplines
- Performance Consulting Instructional Designs
- Information Architecture Knowledge Management
- Content Development Program Management
- Change Management Community Management
- Measurement & Evaluation Business Intelligence

## Tools & Technology
- LMS, LCMS Learning Portals Talent Mgt. Systems
- Content Development Content Management
- Collaboration Social Networking
- Rich Media Mobile
- Assessment Search, Tagging
- Performance Support Virtual Classroom
- Reporting and Analytics Measurement Systems

## Culture
- Executive Support Learning integrated With Business Planning
- Development Planning Knowledge Sharing
- Performance and Talent Management Customer Listening
- Innovation Programs Mentoring and Knowledge Sharing
- Employee Feedback Learning from Mistakes

---

Copyright © 2009 Bersin & Associates. All rights reserved.
The Informal Learning Model
Supports today’s Multi-Generational Workforce

Continuous Learning

- Coaching Mentoring
- Communities of Practice
- Career Curriculum

Social Learning
On Demand Learning
Job Aids

Training Event

Retention is Lost

Traditional Training

Time

Expert

Novice
Agenda

- Why is Informal and Social Learning so Hot?
- Defining the Elements of Informal Learning
  - Bersin & Associates Enterprise Learning Framework®
  - Learning On-Demand
  - Social Learning
  - Embedded Learning
- The Informal Learning Architecture
- Measuring Informal Learning
- How to learn more
Learning On-Demand:
*Keys to Success*

- Deep understanding of roles, and uses of information
- Mapping information sources: experts and tacit knowledge
- Creating a “portfolio manager” who can locate and update information needed by business users
- Re-engineering the information architecture of the “learning portal”
- Expanding use of job aids and support systems in the learning environment
On-Demand Learning Environment
Internal Blogs and Wikis

- Experts or SMEs freely share information
- Communities created around product or process launches and changes
- Technical support, R&D, manufacturing quality circles, customer support
Social Learning: Keys to Success

- Establish “communities” of interest which can become “communities of practice”
- Build an online presence which enables information and knowledge sharing – “tribal knowledge”
- Establish a platform which enables comments, content sharing, ratings, and feedback
- “Dare2Share” information and let the community rate and validate usage and quality
- Build the environment into formal learning programs
Social Learning Concept

Quantity and Quality of Knowledge and Expertise

What you can teach

What you can coach or mentor

What you can learn “Tribal Knowledge”

L&D working with SMEs

Mid-level or senior leaders

Collective wisdom of stakeholders

Embedded operational expertise

L&D  Management  Employees  Customers
Social Learning Environments
Dare2Share

We are measuring an ongoing process, not a program…

As more participants join the same network, the value to the individual increases

- The learner is motivated and in control
- The community provides guidance and support
- Anyone produces and promotes content
- The community manages content quality
- Far less random training
- Much higher retention and transfer rates
Communities of Practice

**Figure 4: Structural Dynamics of a Community of Practice**

- **Community**: The regular interactions and relationships among those who find common ground in a particular domain.
  - The community supplies members the opportunity to develop their practice.
  - The practice supplies members with knowledge assets, such as tools, books, databases, theories, principles, etc.

- **Practice**: The socially defined and accepted way of doing things by a community in a particular domain.
  - The practice develops and evolves over time, and renegotiates the domain.

- **Domain**: The common ground shared by a group of individuals.
  - The domain provides the reason why individuals come together in the first place.

Source: The Defense Acquisition University, 2006.
Keys to Social Learning

- Expert Directory
- Closely-knit communities
- Community management
- Content and Conversation platform
- Variety of tools (mobile, yammer, email)
- Architecture for collaboration

- Cultural support
- Leadership support
- Standards
- Courage
Embedded Learning

“Invisible” Learning “in the job”

- Performance Support
- Feedback
  - From managers
  - From peers
  - From leaders
- Rotational Assignments
  - Developmental assignments
  - Cross functional assignments
- After Action Reviews
- Quality Circles
- Customer Councils
- Development Planning
- Peer Review
Need for Career Development

Centralized Approach to Development Drives Far Greater Value

% Improvement in business impact

-20%  -15%  -10%  -5%  0%  5%  10%  15%  20%  25%

Individually  Manager Level  Business Unit Level  Enterprise Level

-20%

-15%

-10%

-5%

0%

5%

10%

15%

20%

25%

Average Business Impact (12 measures)

Engagement and retention
# Cisco Sales Career Development

## Corporate Leadership Development Program

<table>
<thead>
<tr>
<th>Role-Specific Competency Models</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cisco Learning Platform: Develop, Manage, Administer, Measure</td>
</tr>
<tr>
<td>Talent Management Integration</td>
</tr>
</tbody>
</table>

### Foundational Program
- (requirements, electives, resources)
- Pre-Assessment – Place Individual on the Roadmap
- **Expert – Mastery**
  - (real-world simulations, advanced topics)
- **Advanced**
  - (requirements, simulations, assignments, resources)

<table>
<thead>
<tr>
<th>Web 2.0 Collaboration</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-Demand Video</td>
</tr>
<tr>
<td>Communities of Practice</td>
</tr>
</tbody>
</table>

### Coaching and Mentoring
- Peer-based Gated Assessment
- Business Outcome Challenge #1
- Senior Peer Review Board

### Communities of Practice
- Sales representative
- Account Manager
- Sales Leader
- Technical Specialist
- Technical Leader

### Skills and Knowledge outcomes
- Real-world and peer review

### Role-Specific Competency Models

---

Copyright © 2009 Bersin & Associates. All rights reserved.
Structured Coaching for Sales Training

- **Formalized Informal Learning**

- Focus on sales leadership coaching skills, not just sales skills

- Formalized program which forces managers to coach employees

- Employees are trained, supported, and measured
Embedded Learning:
*Keys to Success*

- Establishing employee development as an integral part of management and operations
- Consider “developing people” part of every manager’s job
- Focus on quality, client intimacy, and learning from mistakes
- “Leaders teaching leaders” and expanding the role of development into the mission of every role in the organization
Agenda

- Why is Informal and Social Learning so Hot?
- Defining the Elements of Informal Learning
  - Bersin & Associates Enterprise Learning Framework®
  - Learning On-Demand
  - Social Learning
  - Embedded Learning
- The Informal Learning Architecture
- Measuring Informal Learning
- How to learn more
Architecture for Informal Learning

Employee Portal

Enterprise Social Software

Talent Mgt System

Manager

Tech Support

Peer

SME

Knowledge Database

LMS

Wiki

Employee

Manager

Technology Support

Peer

SME

What I need to know right now.
What skills and competencies I need.
Who I can ask for help.

It’s all about me. My job. My role. My assignment.
Tools

- IT typically drives this decision
- SharePoint is likely to be your company’s standard
- LMS vendors have different and immature offerings
- Cornerstone, Saba, Plateau, Blackboard have social tools today

**Figure 26: Social Software Market Share Leaders**

<table>
<thead>
<tr>
<th>Market Leaders (4% market share or greater)</th>
<th>Emerging Providers (&lt;4% share)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Atlassian</td>
<td>• NewsGator</td>
</tr>
<tr>
<td>• Jive Software</td>
<td>• OutStart</td>
</tr>
<tr>
<td>• LiveWorld</td>
<td>• Q2Learning</td>
</tr>
<tr>
<td>• Mzinga</td>
<td>• SelectMinds</td>
</tr>
<tr>
<td>• Telligent</td>
<td>• SocialText</td>
</tr>
<tr>
<td></td>
<td>• Tomoye</td>
</tr>
<tr>
<td></td>
<td>• Traction</td>
</tr>
<tr>
<td></td>
<td>• Awareness</td>
</tr>
<tr>
<td></td>
<td>• Blogtronix</td>
</tr>
<tr>
<td></td>
<td>• Central Desktop</td>
</tr>
<tr>
<td></td>
<td>• CustomerVision</td>
</tr>
<tr>
<td></td>
<td>• GroveSites</td>
</tr>
<tr>
<td></td>
<td>• introNetworks</td>
</tr>
<tr>
<td></td>
<td>• Ensemba</td>
</tr>
</tbody>
</table>


www.bersin.com/socialsoftware
New Roles

Where Measurement Happens

- Content Standards
- Authoring Tools
- Content System(s)
- Publishing Tools
- Information Architecture

- Community Management
- Sharing Guidelines
- Cultural Reinforcement
- Rewards and Feedback
- Monitoring and Standards

- Systems Integration
- Interface to IT standards
- Expert Directories

Employee

Employee Portal

Portfolio Management

Content (Media)

Communities (Interactions)

Connections (Directories)
Agenda

- Why is Informal and Social Learning so Hot?
- Defining the Elements of Informal Learning
  - Bersin & Associates Enterprise Learning Framework®
  - Learning On-Demand
  - Social Learning
  - Embedded Learning
- The Informal Learning Architecture
- Measuring Informal Learning
- How to learn more
Why Informal Learning?

Your outcomes and goals may be different… and even better!

Business Drivers

- Compress time to competency
- Capture & reuse tacit knowledge
- Provide quick and consistent responses to constant changes
- Eliminate organizational silos
- Attract new entrants
- Increase employee engagement
- And...
- Reduce training costs
## Measuring Informal Learning

*New things to consider as we develop measurement approaches*

<table>
<thead>
<tr>
<th>On-Demand</th>
<th>Social Learning</th>
<th>Embedded Learning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do we have the “right” elements?</td>
<td>Are people using the environment?</td>
<td>What is the learning culture and how do we improve it?</td>
</tr>
<tr>
<td>Are they easy to find and use in the context of work?</td>
<td>Are authors contributing?</td>
<td>Do we have talent processes which drive development?</td>
</tr>
<tr>
<td>How effectively do they address learning issues?</td>
<td>Are users finding value?</td>
<td>Do we have the right business processes to drive learning?</td>
</tr>
<tr>
<td></td>
<td>Is feedback taking place? by who?</td>
<td></td>
</tr>
</tbody>
</table>

Where is informal working well? Where is it failing? How can we better design, target, support, and focus our informal learning approaches?

---

*On-Demand Social Learning Embedded Learning*
Driving the Right Culture

We need to measure drivers of contribution and sharing

Culture and Motivation

- Some people will require encouragement and motivation
- You need to find a way to help really busy and "smart" people make a contribution
- Only 5% to 10% of your workforce will make significant "contributions" of content and information - everyone else will endorse, rate, and consume
- A bunch of content and information is worth little without networking and discussions
Rewarding Sharing

- All knowledge sharing sites have ratings and rankings
- Top ranked contributors are rewarded publically by the CEO or VP of Engineering
- Information sharing is added to performance plans of technical and process experts

In a recent interview in FORTUNE magazine\textsuperscript{207}, the CIO of GE said the following with regards to the role of social networking at GE.

“We’ve gone out of our way to call it professional networking rather than social networking. We’ve been building a professional-networking capability that allows everybody to put in the organization directory the skills that they bring to bear. It’s very searchable, so if someone is looking for a particular skill, they can go to that site. That gets about 25 million hits a day, so it really is becoming sort of a heartbeat of the company.”

Vocabulary matters. The words used by the organization to describe knowledge and knowledge-sharing speak to its ascribed value within the organization.
## Impact Measurement Framework®

© Bersin & Associates

<table>
<thead>
<tr>
<th>Satisfaction</th>
<th>Learning</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td><strong>Adoption</strong></td>
<td><strong>Utility</strong></td>
</tr>
<tr>
<td>Did you reach the desired audience? Did they complete or comply as desired? Who did not comply and why?</td>
<td>How well do programs solve the workforce’s particular problems? How well did it align to the specific job-related problems and issues? Would learners recommend this program to their peers?</td>
</tr>
<tr>
<td><strong>Efficiency</strong></td>
<td><strong>Alignment</strong></td>
</tr>
<tr>
<td>How efficient and cost-effective How did it compare to other similar programs or competitive programs? How well did it use learner’s time?</td>
<td>How well were program business priorities defined? How well did business units buy off on the value of this program relative to other investments?</td>
</tr>
<tr>
<td><strong>Attainment</strong></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td><strong>Alignment</strong></td>
<td><strong>Attainment</strong></td>
</tr>
<tr>
<td>How well did you meet specifically defined client (business user or customer) objectives? These may be revenue, time to market, compliance, time to complete, etc.</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>9</td>
</tr>
<tr>
<td><strong>Individual Performance</strong></td>
<td><strong>Organizational Performance</strong></td>
</tr>
<tr>
<td>Indicators asked of learners and managers to gauge performance improvements. Specific operational measures identified in the performance consulting process.</td>
<td>General business measures or HR measures which are already captured in the organization (ie. engagement, retention). Special surveys can be used to determine indicators using the “wisdom of crowds.”</td>
</tr>
</tbody>
</table>
Impact Measurement Framework®
© Bersin & Associates – Adapted for Informal Learning Environments

1. Satisfaction
   - Adoption
     - Did you reach the desired audience? Did they complete or comply as desired? Who did not comply and why?
   - Utility
     - How well do programs solve the workforce’s particular problems? How well did it align to the specific job-related problems and issues? Would learners recommend this program to their peers?

2. Learning
   - Efficiency
     - How efficient and cost-effective was the program? How did it compare to other similar programs or competitive programs? How well did it use learner’s time?
   - Alignment
     - How well were program business priorities defined? How well did business units buy off on the value of this program relative to other investments?
   - Attainment
     - How well did you meet specifically defined client (business user or customer) objectives? These may be revenue, time to market, compliance, time to complete, etc.

3. Contribution
4. Utility
5. Efficiency
6. Alignment
7. Attainment

8. Individual Performance
9. Organizational Performance
10. Feedback
11. Activity
12. Satisfaction
Contribution

What is the volume, frequency, and depth of contribution made?

What % of experts are contributing in what areas?

How regular and current is the response to comments and questions?

How rapidly are people keeping up with changing needs?

Feedback

How well are people commenting on and rating comment in a fair way?

Is feedback being read and used by authors?

Is feedback being ranked and analyzed by the organization?

Are authors and others using feedback well?

Can we “rate” authors well?

Activity

How many people are accessing the system and at what frequency?

What groups have greatest access and which are not using it yet?

How widely distributed is the activity in the program?

How well are higher level people contributing?
What is the “ROI” of informal?

It’s different but very large...

- Field engineers reading newspapers and drinking coffee during down time rather than learning
- Coaches creating manuals and delivering one to one demonstrations
- Team leaders frequently conducting the same safety briefings
- Sales people spending days searching for answers and best practices
- Line managers answering the same question over and over again

Our initial business case was approved on the basis of improving learning efficiency. We aim to measure business "outcomes" and "results" after deployment.
How to Learn More

- Informal Learning Workshops
  - Assess your readiness
  - Develop a strategy and design program
  - Select tools if necessary
- Enterprise Learning Assessment
  - Internal workshop and planning session
- E-Learning Technology UK
  - January, 2010
- High Impact Learning Practices®
  - www.bersin.com/hilp
- Research Conference April, 2009
  - http://impact.bersin.com
- Contact us: info@bersin.com or call (510) 347-4300