

# The Adoption of Mobile Learning Is Approaching a Tipping Point (Aug 12)

As the pace of mobile device adoption inside organizations accelerates, it's surprising how few organizations are investing in mobile learning. Learning and development and HR groups can no longer afford to ignore the opportunities and benefits offered by mobile learning.

## Impacts

- Increased use of smartphones and tablets, coupled with shifting employee demographics, will force learning and development (L&D), HR and IT organizations to initiate and formalize mobile learning strategies.
- The Nexus of Forces transforming user behaviors will create opportunities to adopt enterprise mobile learning solutions.
- L&D organizations that base new business cases on mobile capabilities will reap greater benefits than those that focus only on immediacy of access and the benefits of collaboration.

## Recommendations

- L&D, HR and IT organizations should look to extend knowledge retention and transfer by providing more-personalized learning experiences.
- Take advantage of what's happening at the nexus of mobile, social and cloud services in the consumer world to leverage opportunities in a business context. Look to consumer usage to drive new learning ideas and opportunities.
- Organizations should assess when mobile adds business value and not let IT dictate the mobile learning strategy.

## Analysis

Mobile has been a buzz word in the learning market for several years, and the noise is getting louder. Our latest research indicates that most organizations are just beginning to explore the ins and outs of mobile learning. Wikipedia defines mobile learning as, "Any sort of learning that happens when the learner is not at a fixed, predetermined location, or learning that happens when the learner takes advantage of the learning opportunities offered by mobile technologies." At first glance, the proliferation of mobile devices inside organizations has opened another valuable consumption path. A small, but growing number of L&D, HR and IT groups from leading organizations have initiated projects or formalized strategies to take advantage of the broad-based adoption of smartphones and tablets. These organizations are taking action and investing, as the "anytime and anywhere" demands of their users have reached a crescendo.

To maintain or create a learning culture, L&D must not only meet the growing demands of its learner population, but attempt to provide a more personal learning experience. Gartner recommends that organizations first evaluate the capabilities of their existing learning and HR providers, as well as leverage Gartner's Pace-Layered Application Strategy (see ["Applying Gartner's Pace-Layered Application Strategy to Human Capital Management"](#)) to identify opportunities in systems of differentiation and systems of innovation.

## **Increased use of smartphones and tablets, coupled with shifting employee demographics, will force L&D, HR and IT organizations to initiate and formalize mobile learning strategies**

Gartner estimates that tablet production will grow from slightly fewer than 120 million units to more than 370 million units in 2016. In addition, we expect smartphone production to increase from approximately 650 million units in 2012 to more than 1.3 billion units in 2016 (see ["Forecast Analysis: Mobile Phones and Consumer Electronics, Worldwide, 1Q12 Update"](#)). By 2016, most workers in developed nations will have a smartphone or tablet. In addition, Apple's 2011 product sales figures

paint a similar picture of the mobile movement — Apple sold more iPhones, iPads and iPod touches in 2011 than it sold Macintosh computers during the company's 28-year history.

**Figure 1: Top Impacts and Recommendations for Mobile Learning Adoption Is Approaching a Tipping Point**

<i>Impacts</i>	<i>Top Recommendations</i>
Increased use of smartphones and tablets, coupled with shifting employee demographics, will force L&D, HR and IT organizations to initiate and formalize mobile learning strategies.	<ul style="list-style-type: none"> <li>• Inventory the mobile devices your workers already have, which will help you determine what's possible in the short term.</li> <li>• Align with other mobile initiatives in your enterprise to ensure consistency, gain investment leverage and understand the lessons learned.</li> </ul>
Most organizations start with small, targeted pilot initiatives, but don't dismiss the potential for enterprise use.	<ul style="list-style-type: none"> <li>• L&amp;D, HR and IT should look to extend knowledge transfer by providing learners with a more personalized experience.</li> <li>• Take advantage of what's happening at the nexus of mobile, social and cloud services.</li> </ul>
L&D organizations need to envision potential new business cases, based on mobile capabilities.	<ul style="list-style-type: none"> <li>• Organizations need to consider when mobile adds business value.</li> <li>• L&amp;D groups need to look to improve user experience, productivity, data capture and service delivery.</li> </ul>

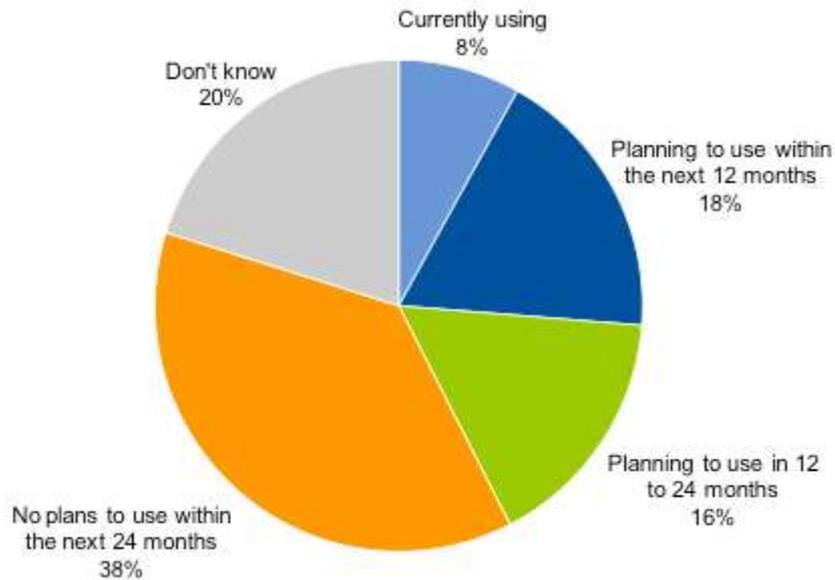
Source: Gartner (August 2012)

In addition to this mobile wave, the latest labor statistics and forecasts show that organizations will be experiencing a dramatic shift in employee demographics during the next five years. By 2015, more than 50% of the worldwide workforce will have been born after 1980. These younger employees (often referred to as the "Millennial Generation") often have a longer track record and familiarity with communication, collaboration, media and digital technologies.

The bring your own device (BYOD) movement opens additional doors, but also adds complexity. We recommend that organizations don't get bogged down evaluating the devices themselves, but how employees and potential learners use those devices. In addition, L&D organizations should first look to align their mobile strategy with the corporate mobile strategy, without allowing this alignment to delay investment in mobile learning. In the process, they should engage stakeholders from the HR, legal and/or compliance departments. Work with your legal and/or compliance department and your internal audit team to ensure that these policies are appropriate for your organization and adhere to local and/or regional regulations, such as those addressing user privacy and enterprise e-discovery needs.

With these forces at play, it's surprising that most organizations we speak with in our inquiries about mobile learning have not begun to address these implications as part of their strategy. Our survey work of 99 references (see ["Magic Quadrant for Corporate Learning Systems"](#)) shows that fewer than 10% of organizations are using mobile course delivery (see Figure 2).

**Figure 2: Mobile Course Delivery**



Source: Gartner (August 2012)

**Recommendations:**

- Inventory the mobile devices your workers already have and their planned adoption. This will provide you with a sense of what's possible in the short term.
- Align with other mobile initiatives within your enterprise to ensure consistency, gain investment leverage and understand the lessons learned in deployment.
- Leverage your providers and their mobile efforts. Most vendors have a degree of smartphone support that includes support for basic self-service transactions, information access and approvals/workflow. Implementing these capabilities can provide some "quick wins" as you look for opportunities to do more with mobile technology.

**The Nexus of Forces transforming user behaviors will create opportunities to adopt enterprise mobile learning solutions**

During the past few years, corporate learning systems (CLSs) have shifted from departmental purchases toward broader, enterprise-wide initiatives. This shift has fuelled a wave of mergers and acquisitions in the learning market (see "[Market Consolidation Complicates Selection of a Learning Management Provider](#)"). Early mobile initiatives addressed the demands of learners who are constantly on the go, in the field or in locations with bandwidth constraints. The target audience has initially been groups such as sales, field engineers, medical workers and repair technicians. In addition, most of the L&D professionals with whom we've spoken recently have focused their mobile efforts on short and digestible chunks of information. For example, a number of leading organizations with mobile sales forces use their devices to perform support roles as quick references for the latest product knowledge, sales training and compliance efforts.

Some early movers are leveraging mobile learning simply to add a portable access point and to aid with the discovery of information; however, if you look at how the growing population of consumers use mobile devices for social networking, maps, news, weather, sports information, search, video/photo sharing, etc, it's hard to ignore the potential for mobile learning. The consumerization of IT is a result of the availability of excellent devices, interfaces and applications with minimal learning curves. A nexus of converging forces — social, mobile, cloud and information — is building on and

transforming user behavior, while creating new business opportunities (see ["The Nexus of Forces: Social, Mobile, Cloud and Information"](#)).

**Recommendations:**

- L&D, HR, and IT should extend knowledge retention and transfer by providing learners with more-personalized experiences.
- Take advantage of what's happening at the nexus of mobile, social and cloud services in the consumer world to leverage these opportunities in a business context. Look to consumer use to drive learning ideas and opportunities.
- Leverage Gartner's Pace-Layered Application Strategy to identify specific opportunities to use mobile technology to create systems of differentiation or innovation. The speed with which you can develop and iterate mobile applications make them ideal for differentiating or innovative applications.

**L&D organizations that base new business cases on mobile capabilities will reap greater benefits than those that focus only on immediacy of access and the benefits of collaboration**

Organizations should look beyond simply reformatting their libraries of Web-based training for mobile delivery. With built-in capabilities (e.g., GPS/location services, cameras and sensors) that provide additional learning data such as accurate audience tracking information, the multifunctional nature of smartphones and tablets presents new learning opportunities. L&D organizations need to embrace collaboration and look to empower their more sophisticated users. Learning has always been a social process. If you take social learning as an example, social interactions that are transient, fleeting and spontaneous have more business value when they're possible wherever the user is located.

Employees expect access to similar functionality across all their roles and make fewer distinctions between work and non-work activities. Outside their jobs, people expect to be able to use presence and location services, contextual search results and spontaneous interaction with their social networks to enhance everyday experiences. And they spread those experiences across multiple devices, often at the same time. L&D departments need to take advantage of this consumer trend and to leverage these new capabilities within the organization.

Organizations should seriously assess areas in which mobile adds business value. Early adopters have stressed the importance of immediacy of access and the benefits of collaboration. Organizations shouldn't view these areas simply as IT-driven initiatives. L&D and HR shouldn't simply adopt IT's broad mobile policies; L&D executives need to evaluate business user requirements and allow specific business cases to drive mobile learning projects.

For example, more than 12 National Football League (NFL) teams have digitized their playbooks and have supplied team personnel and players with iPads. The initial response has been positive, providing coaches the ability to make quick updates and include richer video capabilities to improve the learner/player experience. Some organizations have taken it a step further — the Cheesecake Factory built an iPhone game as a more interactive way to teach employees how to memorize the steps and the ingredients for making hamburgers. We will be watching closely as a growing number of organizations formalize their mobile learning strategies in 2012 and 2013.

**Recommendations:**

- Organizations need to consider when mobile adds business value, and they shouldn't let IT dictate their mobile learning strategies.
- L&D groups need to empower their learners by improving their users' experiences, productivity, data capture and service delivery.

1. Gartner Inc, The Adoption of Mobile Learning Is Approaching a Tipping Point, G00227694, 8 August 2012