



Digital Learning: Being Successful in a Post-Pandemic World

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Europe's #1 HR Industry Analyst

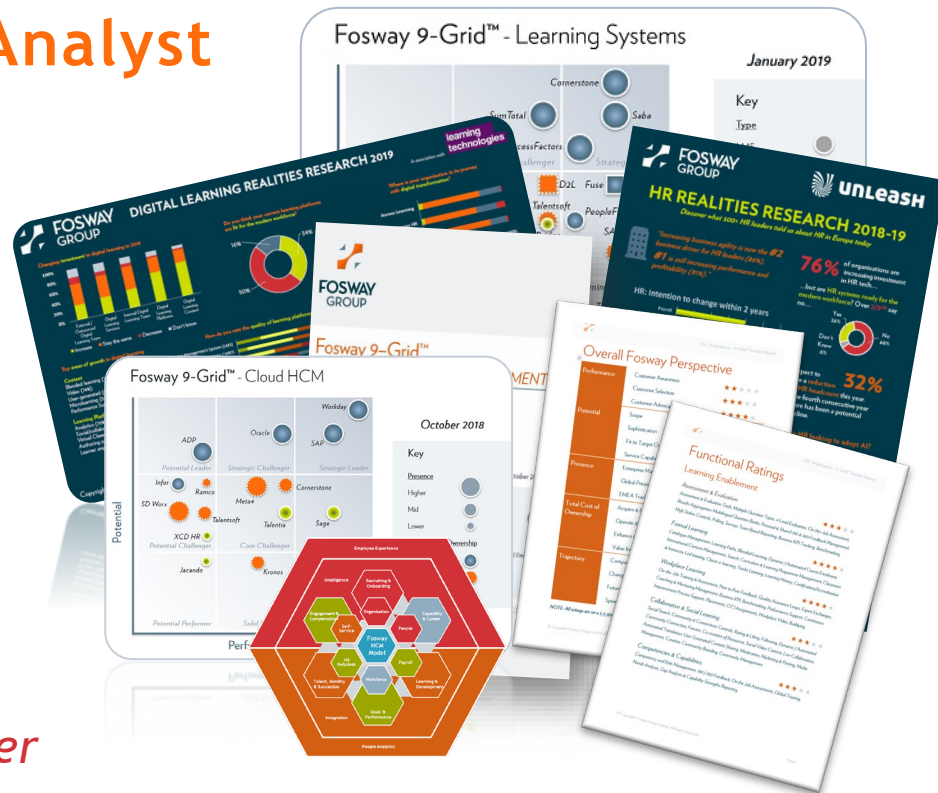
Founded 1996

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

**Analyst & advisory services to
European & International HQ
multi-nationals and corporates**

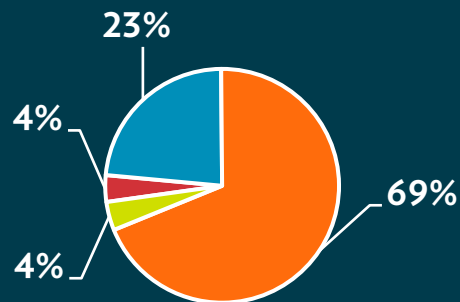
**Independent vendor research
and EMEA market commentary**

Make better HR buying decisions faster

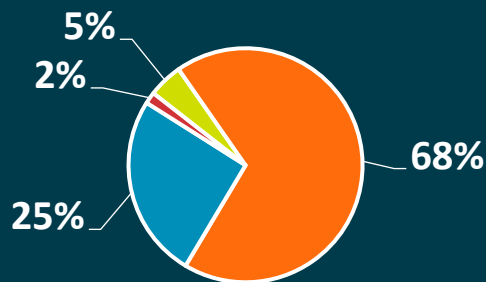


Where are you in your journey with the Digital Transformation of Learning?

2018



2019

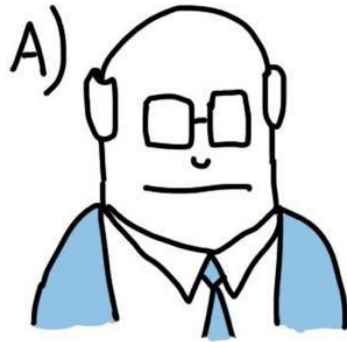


2020



■ Completed ■ In progress
■ Planning ■ Not applicable

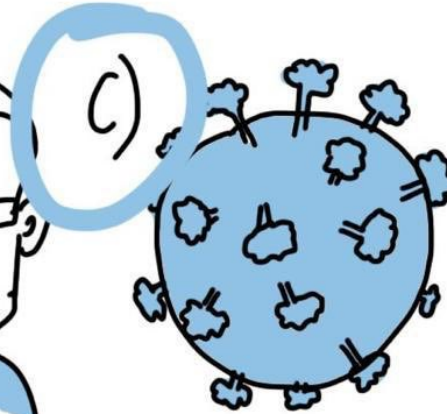
WHO LED THE DIGITAL TRANSFORMATION
OF YOUR COMPANY ?



THE CEO



THE CTO



COVID-19

[BUSINESSILLUSTRATOR.COM](https://businessillustrator.com)



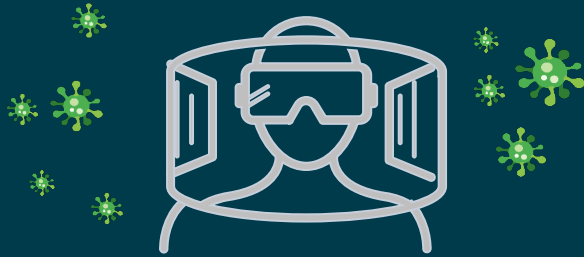
COVID-19: Impact on L&D

Fosway Research

<https://www.fosway.com/research/next-gen-learning/covid19-research/>

94%

of L&D professionals have reported having to change their L&D strategy in response to the COVID-19 pandemic.



With 2 in 3 making *significant* changes to what they do and how they do it.

Coping with the impact isn't easy

Only **1 in 4**

found it easy to cope with the changes to their L&D operations as a result of the pandemic.



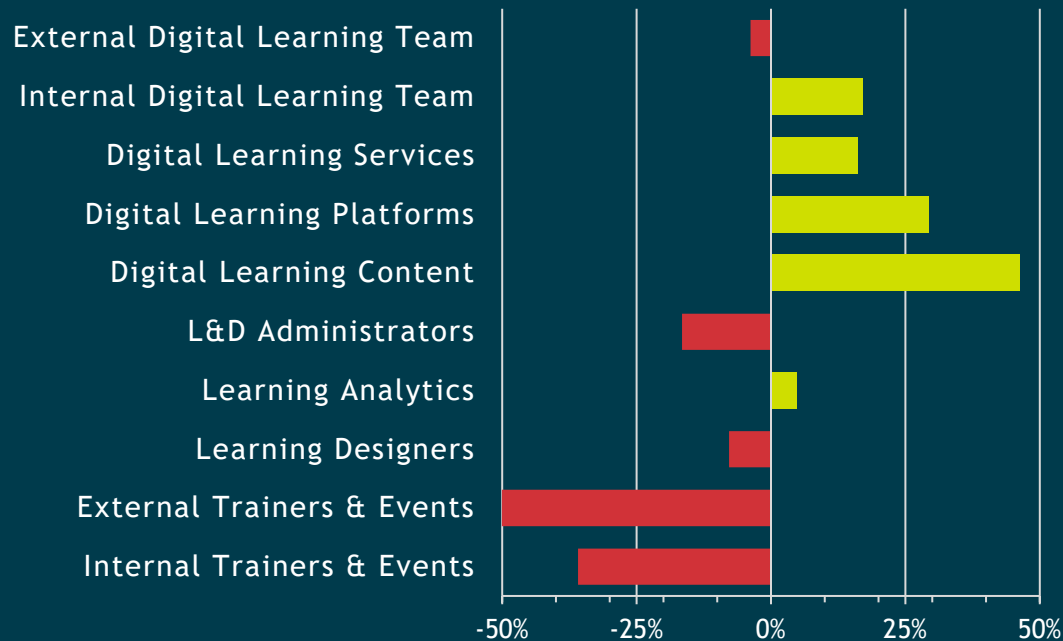
42% *found it difficult coping with the impact on their L&D operation*



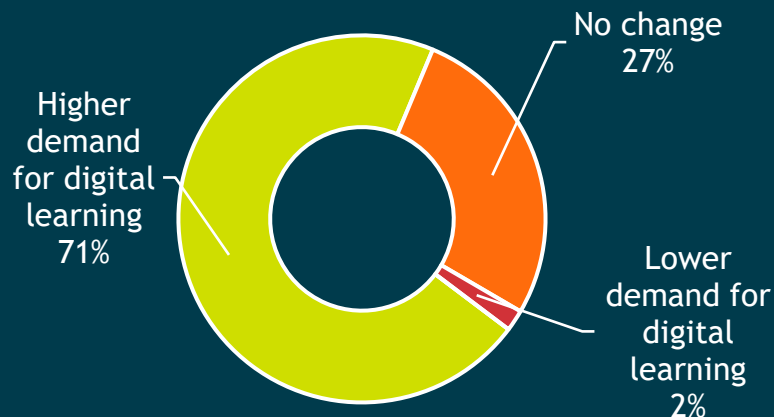
A Major Swing to Digital Learning

Spend on Digital Learning is the most resilient of all L&D expenditures. All areas of Digital Learning have been more likely to increase than decrease, led by digital learning content, except for external digital consultants, which showed a marginal decline.

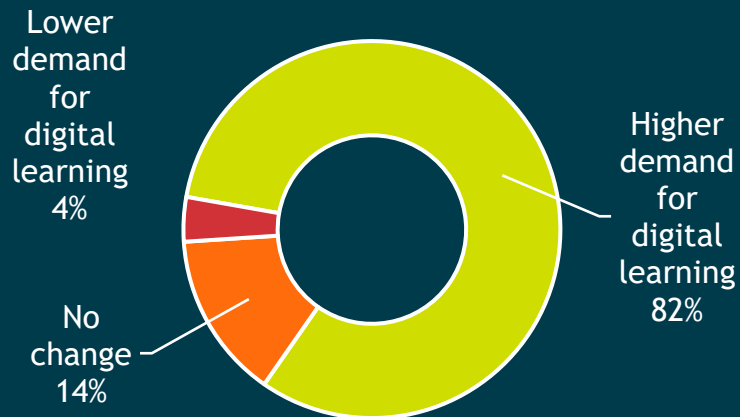
% of organisation's increasing / decreasing their L&D expenditure



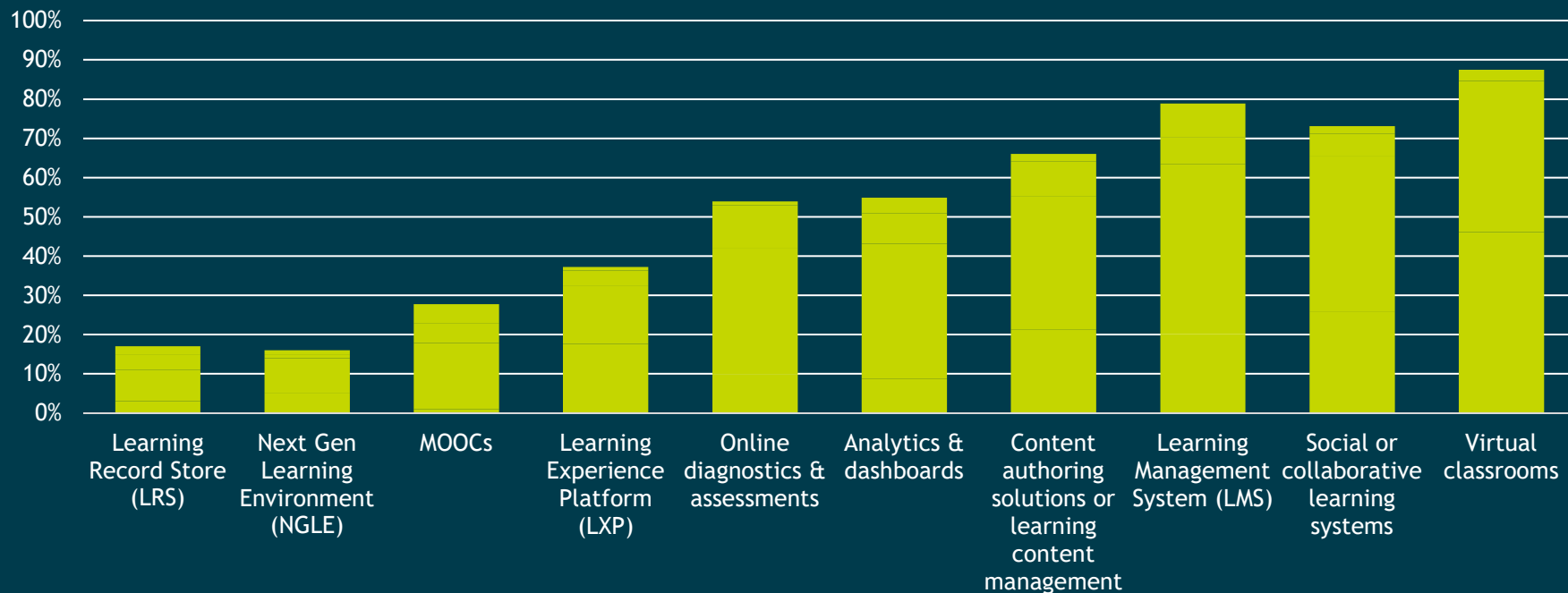
71% *have experienced
an increased demand for
Digital Learning from
End Users*



82% *Demand for
Digital Learning from
Senior Stakeholders has
increased*

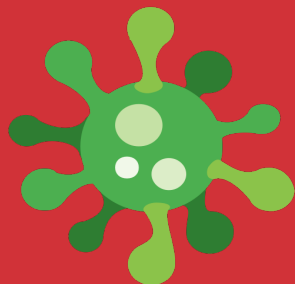


What learning platforms / solutions are being used?

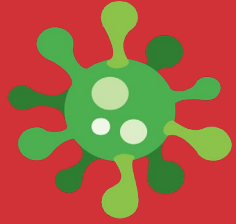


21%

*have implemented a '**NEW**' digital learning solution or expanded their number of licenses*



10% have rushed through a digital learning procurement in response to the pandemic



Digital learning maturity matters

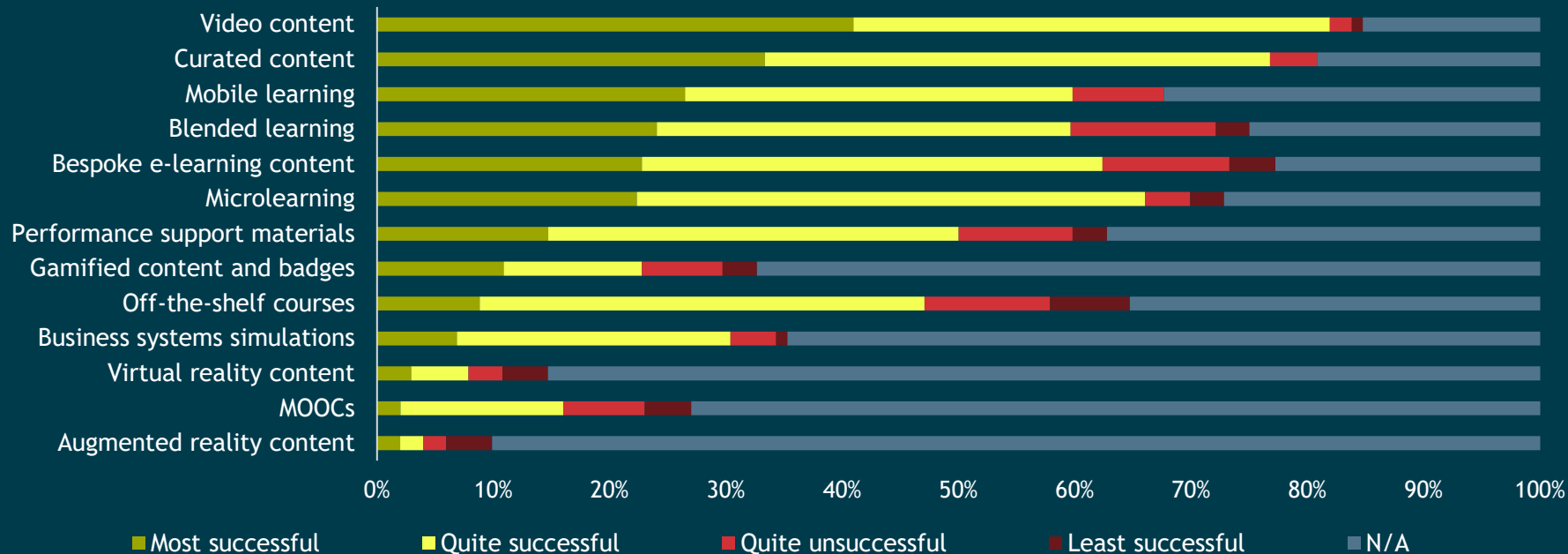
59%

thought their organisation's adoption of digital learning was immature

*Those with a mature digital learning approach are **twice as likely** to have found coping with the impact of the pandemic easy.*

*Those with immature digital learning adoption are **3X** more likely to have found **coping with the pandemic difficult**, compared to those with a mature approach to digital learning.*

What types of learning content have been most successful in supporting your organisation during the pandemic?



MOST SUCCESSFUL in supporting organisations

53%



*Virtual
Classroom*

48%



*Learning
Experience
Platform*

36%



*Collaborative
Learning*

29%



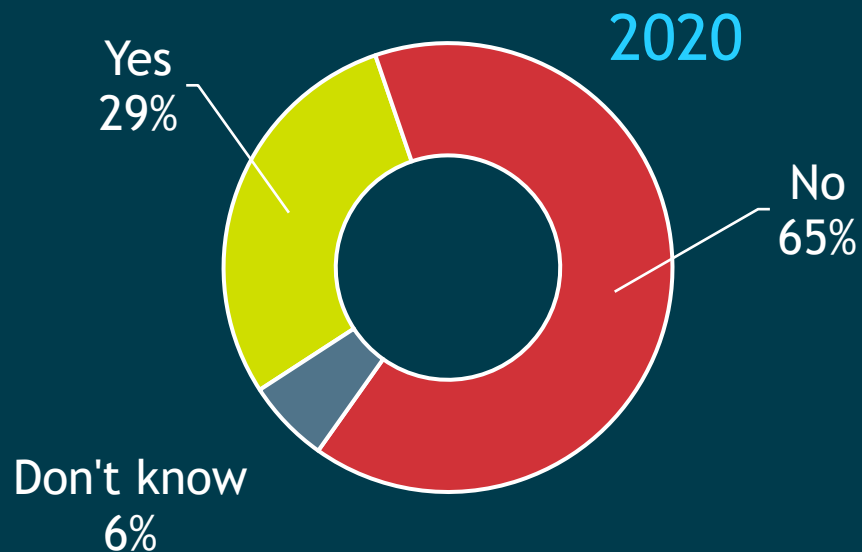
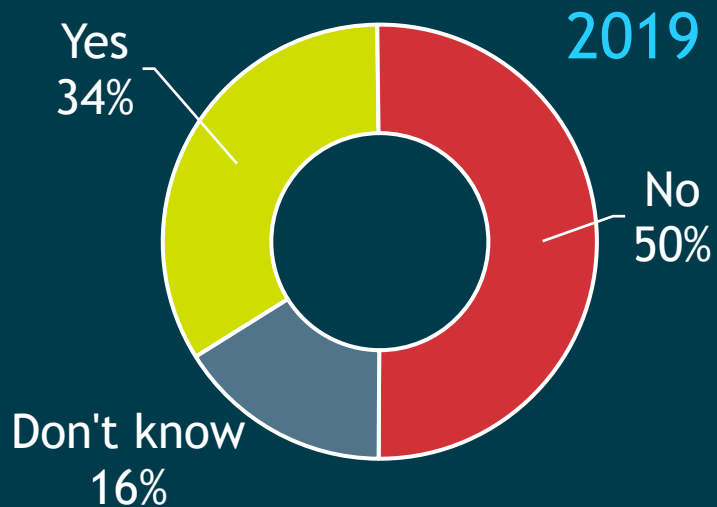
LMS



Where Next?

We are not going back ...

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

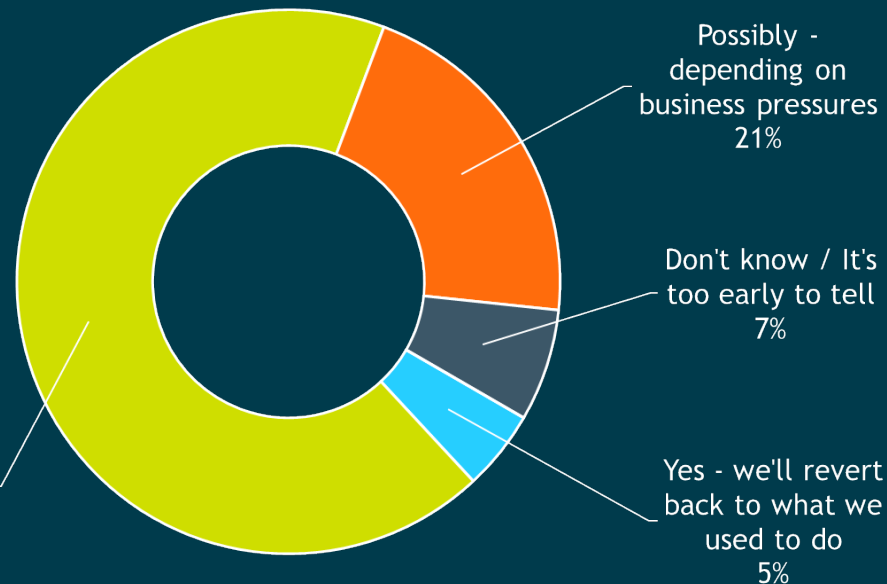


L&D will never be the same again

Only 5% think their learning strategy, investment and resourcing will go back to what it was before the pandemic began.



No - these changes have created a major shift in what we do, and how we do it
67%



FOCUS ON WHAT IMPACT YOU MAKE = 3 LAYER **VALUE** MODEL*



1

Business Impact



2

Functional Operations & Process



3

Systems & IT Operations

KPIs

Tangible

* Fosway Group Model for structuring the core business case for HR Technology/Innovation investment

Know your context and audience!



The
OLD
World

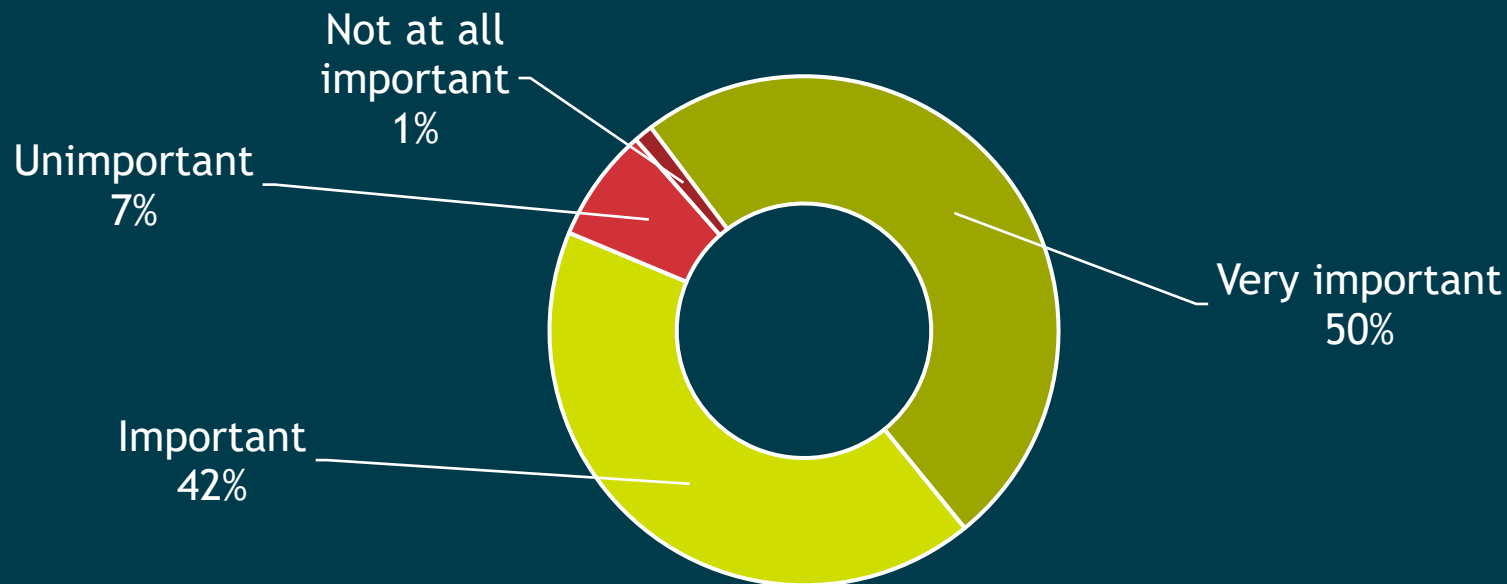
Broadening LEARNING...

- ▶ Many learning strategies
- ▶ Many learning contexts
- ▶ Many learning outcomes

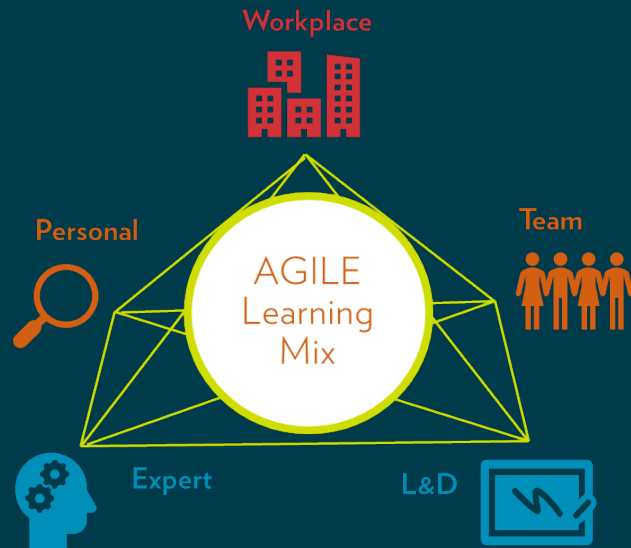
The NEW
World



How important do you believe Learning Experience is to the future success of your L&D operation?



... but what sort of
“**Learning Experience**”
are you trying to enable?





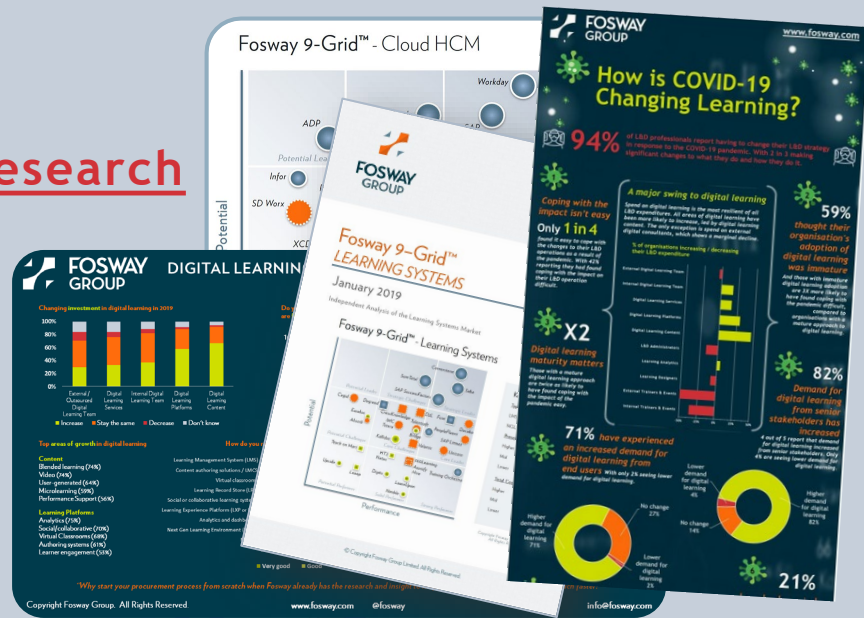
84% of L&D leaders think it is now more important to integrate 'digital learning' into corporate collaboration platforms like Microsoft Teams, Slack, Trello, etc

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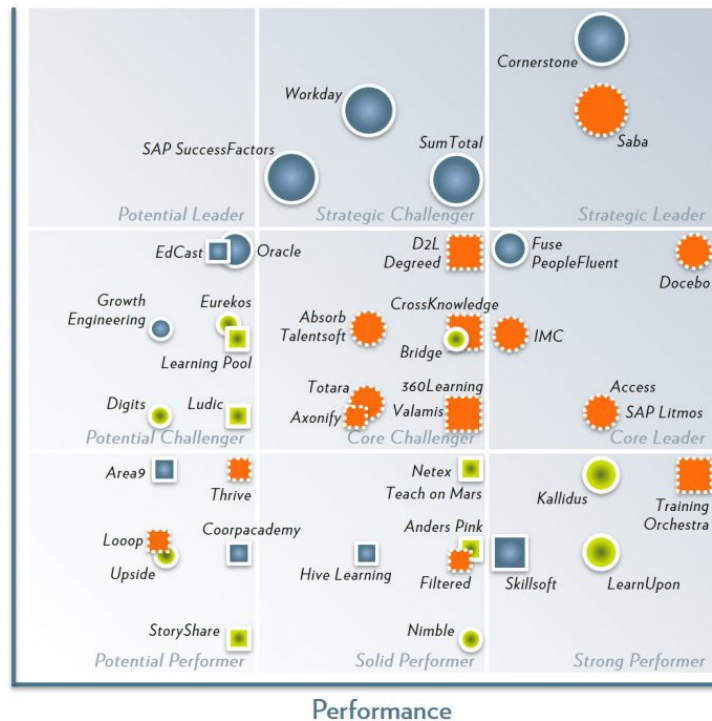
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- Digital Learning
- Cloud HCM
- Talent Acquisition
- Talent Management



<https://www.fosway.com/research/next-gen-learning/covid19-research/>

Fosway 9-Grid™ - Learning Systems

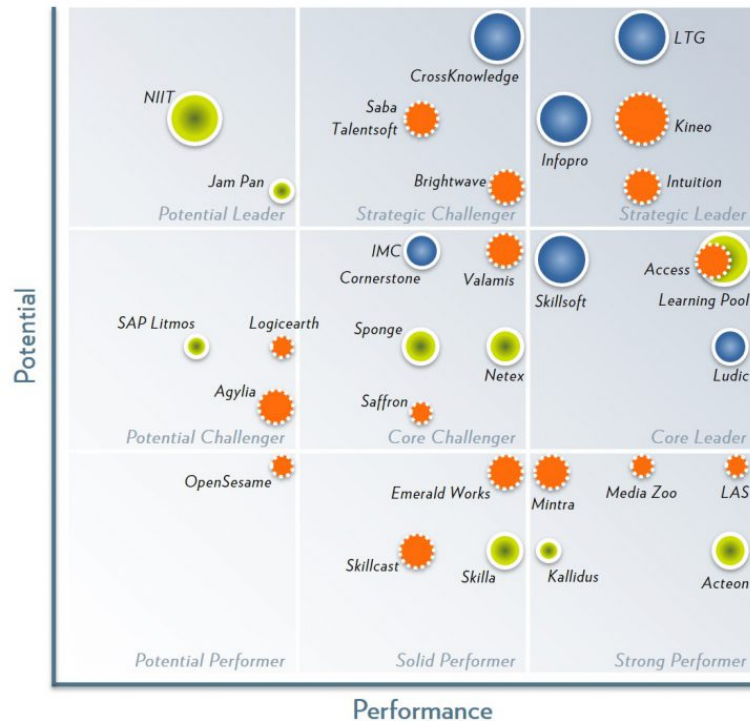


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Fosway 9-Grid™ - Digital Learning





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