The Impact of Technology and Social Media on Learning

“Our inherent drive to learn together can be facilitated through emerging technologies that extend, widen and deepen our reach ... enabling a new kind of knowledge-building ecosystem with people at its core.”

Tony Bingham and Marcia Connor.
The Impact of Technology and Social Media on Learning

Andrew Lambert
## Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foreword</td>
<td>5</td>
</tr>
<tr>
<td>Introduction</td>
<td>6</td>
</tr>
<tr>
<td>Acknowledgements</td>
<td>7</td>
</tr>
<tr>
<td>Executive Summary</td>
<td>8</td>
</tr>
<tr>
<td>1 What’s the issue?</td>
<td>10</td>
</tr>
<tr>
<td>2 What’s changing – in learning?</td>
<td>13</td>
</tr>
<tr>
<td>3 What’s changing – in applying technology, systems and channels?</td>
<td>21</td>
</tr>
<tr>
<td>4 Moving the organisation forward</td>
<td>31</td>
</tr>
<tr>
<td>5 Case studies</td>
<td>56</td>
</tr>
<tr>
<td>6 Reading list and references</td>
<td>57</td>
</tr>
</tbody>
</table>
Our business involves working in partnership with organisations across many sectors and geographies. Since we were founded in 2000, more than 300 organisations have come to rely on GoodPractice to provide a wide range of learning and knowledge resource. We have already helped over a million leaders and managers to learn and work more effectively.

We also sponsor research to help our clients appreciate trends and developments, and to guide the way we work with them.

For example a study we undertook in 2009 explored what leaders and managers wanted from their HR and Learning & Development functions.

There appeared to be significant opportunities for HR and Learning & Development functions to ‘raise their game’ in meeting these demands, and thereby enhance organisational performance.

Since 2009 much has happened regarding technologies and the way that they are being used in society in general. And the work environment is more volatile and challenging than ever.

With this in mind, we were keen to support CRF’s proposal to do a thorough stock-take of the impact on business organisations – what they are doing and what they should be doing.

This report does more than just dispel myths and misunderstandings – it points the way forward for organisations about fundamental issues concerning learning and work. There is a real sea-change in progress, and the report has strong advice for HR and L&D, and also for organisational leaders and other relevant functions such as IT and communications departments.

Peter Casebow
Chief Executive
GoodPractice.
Introduction

This research project came about because of significant developments since CRF last examined organisation learning some five years ago. The growth and use of social media and mobile devices has been dramatic, with organisations being challenged to adopt and adapt.

Discussions with CRF members suggested anecdotally made us aware that informal learning was receiving greater emphasis. The smarter use of technology is relevant here. Clearly, organisations need to

• work in a more 'globalised' way
• learn and adapt faster to remain competitive and survive economic pressures
• realise more value from investments in learning.

We examined

• where organisations are making progress – or are struggling
• what learning and development practices should be retained or changed
• the future deliverables and capabilities that HR and L&D functions should aim for.

As a narrow focus on L&D was neither practical nor desirable, the report looks at how

• 'learning' inter-relates with broader business issues – how work is done, performance, improvement, innovation, collaboration and the employer brand
• and why the important issues are less about technology and more about what organisation culture enables or disables.

We raise issues of fundamental strategic significance, and make recommendations for organisations to consider in future.
About CRF

Founded in 1994, the Corporate Research Forum is a membership organisation whose international focus is on research, discussion and the practical application of contemporary topics arising from people management, learning and organisation development. CRF has become a highly influential focal point and network for over 100 members representing a cross-section of private and public sector organisations.

- Its annual programme of research, events and publications fully reflects members’ interests, in addition to the annual international conference. Side meetings and interest groups are also initiated to meet challenges that members might have.
- Contributors are acknowledged experts in their field with a worldwide reputation as leaders and innovators in management thinking and practice.
- Sharing and collaboration among members is a key feature of CRF’s activities. We actively encourage networking at all events, and especially through member lunches and HR director dinners.
- The Forum is led and managed by highly regarded former HR professionals who have a passion for delivering excellence in the leadership and development of organisations and people.

CRF’s goal is to be valued for excellence, rigour, relationship building and providing an independent view which, together, lead to measurable improvement in members’ people and organisation performance.

To join CRF or to find out more, see www.crforum.co.uk, e-mail enquiries@crforum.co.uk or call +44 (0) 20 7470 7104.

Acknowledgements

The author thanks all research participants who include executives from BT, Carphone Warehouse, Centrica, Civil Service Learning, CJ Clarks, CSC, Deloitte, Dyson, Ericsson, GlaxoSmithKline, IBM, John Lewis, Lilly, Prudential, Royal Bank of Scotland, Standard Life, United Biscuits and several companies that preferred anonymity.

In addition, expert contributions came from Peter Butler, Peter Casebow, Clive Shepherd, Donald Taylor, Kris Swanson, Paul Miller, Peter Whealy, Mike Haffenden, David North, Mee-Yan Cheung-Judge and others.

About the author

Andrew Lambert

Andrew Lambert is an associate and co-founder of the Corporate Research Forum. His reports for CRF have covered many topics, the most recent of which was Managing the People Dimension of Risk, 2010. He also works for Creelman Lambert, specialists in human capital and corporate governance and has been a consultant in organisational change and development for nearly 30 years.

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Executive Summary

Context – the ‘media revolution’

1 Two communication technology developments are catalysts for societal change and influencing the way people learn and develop.
   - Mobile devices are changing how people conduct their lives.
   - Social networks are increasingly affecting how business is done – as well as how organisations behave and are managed.

2 These developments are affecting organisations in respect of
   - accelerating organisations’ ‘clock speed’, for example in decision-making, problem-solving, business improvement and innovation
   - cost management
   - structures, by breaking down silos and enabling collaboration
   - forcing more openness and transparency into culture.

3 Those managers resistant to more open communications tend to use information security risks as an excuse. However, emerging technologies provide new protections to accompany the people processes that should provide the first line of defence in risk management.

4 Organisations have been quicker at focusing on commercial and PR aspects of the media revolution than focusing on internal work processes, learning, knowledge management, communication and culture. However, most large employers are now taking new media seriously.

Learning and work

5 How is the media revolution affecting the way people learn?
   - Behaviours are changing as people adapt to the new technologies.
   - ‘Digital natives’ are a growing proportion of the workforce – they rely less on ‘knowing’ and more on ‘knowing where’ to obtain rapid answers – and can provide competitive advantage in shaping digital workplaces.
   - Generation Y and Z employees are more inclined to share and learn from peers, and feel frustrated by bureaucracy, IT inefficiencies and a lack of transparency.
   - Being able to use social media is not about age, but more about attitude and familiarity in fully using devices and software.

6 All interviewees are working towards more informal learning, using the 70/20/10 model. While some have done so for years, for others it is a recent development, often driven by economic pressures.

7 Other priority areas for improving learning include
   - making e-learning more interactive and engaging, especially compliance training
   - improving just-in-time work support content, particularly for mobile devices
   - adapting soft skills development to a digital workplace
   - closing the traditional gap between knowledge management and L&D.
Social media and the digital workplace

8 Social media are re-shaping both L&D and knowledge management by promoting peer-to-peer and collective learning, with cultural implications through demanding greater transparency, trust and democracy within organisations.

9 Where processes and software for learning, internal communication and project management become integrated, this enhances collaboration, business improvement, innovation and change management. To achieve this, the HR/L&D, IT and communications functions must themselves collaborate.

10 Companies aiming to become more ‘social’ need to develop employees’ digital competence, use internal evangelists to propagate good practices, and build an engaging leadership cadre to lead learning and collaboration in a digital workplace.

Leadership, HR and L&D

11 Factors holding back organisations from adapting to new communication technologies include

- a poor appreciation of their potential among leaders and managers
- IT functions struggling with legacy systems – as well as or, alternatively, focusing more on the features/costs of technologies than on how people can learn and work effectively
- HR function shortcomings in appreciating the potential of technology or the OD implications
- weak L&D leadership, lacking influence, not devising persuasive business cases, and retaining a traditional training perspective.

12 Traditional RoI measurement is not helpful in identifying benefits, though some organisations are beginning to build a body of convincing evidence of how capability and performance is enhanced.

13 L&D functions should be led by business transformation experts – supported by expertise in sourcing learning solutions internally and externally, learning technology, and the skill/influence to help management to become ‘learning leaders’.

“Simplicity and problem-solving capabilities are the key desirables for the DNA of corporate systems. Better technology helps, but it’s how you use it that counts.” Clifford Burroughs, CIO, United Biscuits.
WHAT’S THE ISSUE?

Topics covered

1.1 Report purpose
1.2 Factors affecting operating environments
1.3 Organisations struggling to keep up
1.4 Four research questions

Introduction

This chapter discusses the rationale for the report along with key societal/business trends which are creating pressures for organisations to respond and adapt.
1.1 Report purpose

This report examines how developments in technologies are impacting on organisation learning. It also raises broader issues, such as the way work is done, relationships and culture. Fundamental questions have emerged about L&D practices, the future of L&D functions, how organisations are managed – and what they need to learn to be able to do things differently and better.

"Smartphones, tablets and apps have embedded mobile technology in our lives, and this revolution is transforming the way we work and interact. Organisations everywhere must respond or risk being left behind."

Fernando Alvarez, VP and Leader, Capgemini Mobile Solutions Global Services Unit.

1.2 Factors affecting operating environments

Since CRF’s most recent reports on learning in 2005 and 2008, factors such as these have changed the operating context and placed extensive demands on organisations.

- The extent, speed and effects of globalisation, along with competition from emerging economies.
- The pace and relentlessness of change.
- Re-aligning business models and practices to cope with economic pressures.
- Technologies and digital communications which build on the factors above.
- The greater prominence of social media is now affecting organisations and their relations with employees, customers and other stakeholders. See the column notes.

These factors present new challenges and opportunities – to think differently about how work is done and the way organisations operate, as these corporate examples show.
“2012 will be a pivotal year for the digital workplace. Work is undergoing a seismic shift as it becomes portal and mobile. It is inevitable that this will start to transform every aspect of organisational life.”
Paul Miller, Digital Workplace Forum.

Dyson and Clarks Shoes
“Communications and collaboration in Clarks is a massively important strategic project,” notes HR Director, Louise Wilson. “We need to develop a new operating model, and an important part of that concerns virtual learning – while also taking precautions to protect our product development security.”
The Dyson case in Chapter 5 describes how Group HR Director, Cathy Doyle-Heffernan, is similarly leading a multi-disciplinary group to develop global working and learning. See also the 2007 CRF report, The Challenge of Operating Globally.
As might be expected, technology companies tend to be ahead – and some are now re-defining themselves as ‘social organisations’.

1.3 Organisations struggling to keep up
From the outset, we became aware that many organisations were struggling to keep pace with the social and technological developments. Legacy IT systems, technophobes in senior positions, security concerns, etc, contribute. Yet, there is nothing new about businesses lagging behind in adopting new communication technologies – rapid messaging tools spread first among schoolchildren, for example.
Also, when organisations begin to extend globally, they have to work, learn and communicate in different ways. More global processes require shared learning, culture and systems. Surveys indicate that L&D struggles to organise learning across global structures.
What is it, then, about the new software and hardware products that can make a real difference to learning? Are we experiencing evolution or revolution?

1.4 Four research questions
Our research posed these four questions about the contextual changes above.
- What is the impact on the way people learn, individually and collectively? We have assessed what has changed, and what has not.
- What is the impact on the way organisations support learning? This includes what HR and the L&D functions should be doing.
- In moving organisations forward, what approaches seem to work best? And what holds them back?
- What can we anticipate and recommend for the future?
Examples and insights from participating organisations are reported. A guide to useful sources is also provided.

Social media developments
- A multiplicity of social media platforms have emerged, creating many issues for private and organisation communication.
- Initially some were about sharing information – YouTube, Wikipedia, MySpace and Bebo, for example – and others about connecting and messaging, such as Blackberry Messenger.
- The channels that do both – Twitter, Facebook, Renren, LinkedIn, etc – are increasingly dominant.
- This is a fast-growing business sector, from platform providers to consultants and application designers.
- Forrester Research estimates that the market opportunity for social software will grow to more than $6 bn by 2016, an increase of 60% annually from 2010. http://www.forrester.com/home#/mediaresources.
- Social media have also become a democratising force that has had a dramatic effect in politics – for example, the so-called Arab Spring. Politicians were alerted to its power by Barack Obama’s 2008 election win.
WHAT’S CHANGING – IN LEARNING?

Topics covered

2.1 Are we learning differently? 14
2.2 Informal and peer learning 14
2.3 Generations Y and Z 16
2.4 Collaboration and knowledge sharing 17
2.5 Conclusions 20

Introduction

In this chapter, we review what has changed – and what has not – in learning as a result of communication technology advances.
"You can’t teach people everything they need to know. The best you can do is to position them where to find it, when they need to know it.” Seymour Papert, MIT.

Understanding inter-connectivity

The inter-connectivity or ‘social’ dimension of the media revolution is particularly significant.

First, people can connect more cheaply, faster and in different ways. Note that multiple channels pose the challenge of deciding how to communicate with people when they may use different methods.

- Inter-connectivity is increasingly expected, and frustrations may arise when people cannot be reached quickly.
- Those preferring privacy can feel pressured, and some may resist social media.

Second, people are connecting with those they don’t know, or encounter fleetingly. They may

- participate in a collective activity such as online chat
- join in a ‘crowd’ or ‘social swarm’ activity, such as a protest movement or fund-raising exercise
- take part in Internet games
- become ‘netizens’, whose primary community is virtual.

Relationships may be minimal or non-existent and, though engagement may be merely transactional, collective activity can have real impact.

Our concern is how the world of work is being changed by these developments.

2.1 Are we learning differently?

Scientifically, the way people learn is not different from several thousand years ago. However, humans adapt to their environments and, in reaction to the ‘media revolution’, are adjusting their behaviour due to the breadth, availability and speed of access to information and connectivity. Organisations must think and plan carefully about how they operate in this new social media context.

Access to knowledge has altered fundamentally. People know that answers to questions – from politics or work to recipes and household appliances – are available in minutes at the press of a few keys.

But, among the new skills they must learn is how to discern what is true, in a world where ‘official sources’ are arguably less revealing and trustworthy. Or, alternatively, they can just choose what to believe, depending on their own proclivities.

2.2 Informal and peer learning – and 70/20/10

For many years, organisations have been advised to make more use of informal learning. The potential advantages include low cost, timeliness – and benefiting from the practical knowledge of others. Peer and experiential learning are also natural ways by which humans acquire knowledge and build experience from birth onwards.

- Increasingly, organisations realise that most workplace learning occurs outside formal interventions. Learning expert Jane Hart estimates this to be around 80%. She advocates a ‘non-training’ approach to learning which should be continuous, embedded in workflows, and part of working smarter. See Non-Training Approach to Workplace Learning
- Jay Cross of the Internet Time Alliance argues that “informal learning is not something L&D can design into formal training to cover everything everybody learns – an impossible task.
- “Rather, it occurs naturally in workflows to help people learn to do their jobs better – a very different way of operating. Trying to control informal/non-formal learning simply turns it into formal learning.” See the Working Smarter Fieldbook 2011.

The power of peer learning

Richard Priddle of Carphone Warehouse described how the company’s Geek Squad Agents operate, providing deeper technical expertise to support customers.

“We recruit inquisitive people with a passion for technology and problem-solving. They’ve been leaders in demonstrating what can be done through online forums and SME-created e-learning. They stay ahead of the knowledge curve and, therefore, gain more benefit from collaborative learning than trainer-led training.”
"We now include all three elements of 70/20/10 in the way we tackle any learning problem. And the 10 needs to support the 20 and 70." **Craig Yetter, GlaxoSmithKline.**

A connected concept is using ‘pull’ as well as more traditional push learning approaches, which is about making content intrinsically appealing to learners.

Also, the 70/20/10 approach can be used to blend different learning methods to help increase effectiveness, including self-development — and to develop managers to be learning facilitators and coaches. See the column.

**Slow shift to informal learning**

Our research revealed that every organisation was still embedding the 70/20/10 approach. While some had been using it for years, at least half said they were at an early stage or had only recently adopted it.

Why has the shift towards more informal learning been so slow?

- Learning experts remark that it is because of a predominance of trainers and former trainers in L&D functions. They appear reluctant to move from the familiar, in terms of formal training, and do not adapt readily to new technology. This tendency can be reinforced by managers’ mindsets.

- It was also observed that some management teams regard development in traditional, formal terms — and they sign off the budgets.

- Trying to create management cadres comfortable with, and able in, coaching and leading learning is a long process — a ‘task focus’ often predominates.

- Managers themselves feel under-supported in their role as learning enablers — 76% of them, according to the 2010 GoodPractice report, *How Managers Learn — In Their Own Words*. That includes how they view L&D’s on-line offerings.

Note this comment from an L&D leader. "We need to educate our business heads to talk more about their needs, not just request training programmes because that’s what they’re used to."

**Drivers of informal learning**

- As the media revolution penetrates organisations, an accelerating focus on informal learning is occurring.

- The concept of social learning is taking root, along with recognition of the value of networking — see, for example, the work of CRF contributor, Professor Robert Cross.

- L&D is under pressure to find savings and demonstrate value-for-money, especially in a recession — distance and informal learning cost less.

- The development of content needs to speed up as typical time-frames for training design are no longer adequate.

- And, given resource constraints, L&D should involve the workforce more in educating itself, since they often have better knowledge than trainers.

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**The 70/20/10 approach**

Developed in 1996 by Michael M Lombardo and Robert W Eichinger, with Morgan McCall, for the Center for Creative Leadership, this builds on the premise that

- development typically begins with recognising a need and being motivated to do something about it

- combining different learning approaches is more effective.

These are the approximate proportions of learning.

- 70% from on-the-job experiences, tasks, and problem-solving.

- 20% from coaching, feedback and advice.

- 10% from formal courses and reading.

The approach is intended as a guide not a rigid formula as organisation and personal circumstances differ greatly.

Notes Peter Casebow of GoodPractice: “Some learning functions are adopting the model as a mantra without understanding the sentiment behind it.”
“Social media and on-line learning are not just for young people. That’s an excuse for organisations not to connect older people too. Most people prefer learning in their own time and space.”  
Peter Butler, former Director of Learning, BT.

The power of reflection
The main lesson from Henry Mintzberg’s 2007 CRF masterclass was to teach managers to reflect more. This is incorporated in Standard Life’s efforts to embed 70/20/10. Head of Learning, Mel McIntyre, told us: “We’ve launched a teaser campaign this week using the strapline ‘when did you last have some ‘me’ time?’”

2.3 Generations Y and Z
Further pressures on learning have come from young talent in organisations, most of whom have grown up with the Internet and social media as part of their daily behavioural patterns.

**GENERATION Y** is defined as those born after 1981. They are also referred to as the millennials; the iPod generation; the me-firsts; the Internet or net generation; the Nintendo generation; the digital generation; generation why; generation next, and the I-generation.

**GENERATION Z** are those born after 1990, and currently starting work. Again, other epithets are used such as Generation M – referring to multi-tasking. Their ‘digital’ characteristics are similar to, but more pronounced than, Generation Y. In Western countries, they are coming to maturity in new conditions of economic austerity, and are having to adapt accordingly.

See the column for their characteristics relevant to learning and work. A term often, incorrectly, used for these generations is ‘digital natives’. It is useful, but only when it describes attitudes and competence, and not generational differences. Becoming a digital native is a by-product of the environment in which young people are developing, not of their age – there are simply more digital natives among the young.

Youth impact on United Biscuits
In 2009, United Biscuits recruited its first cohort of graduates for some time. In assessing the needs of this technologically-savvy group, management discussed having a social media site to help their induction and development

- The pros and cons were considered for over six weeks, after which they decided to create a Facebook page for them.
- At this point, management discovered the graduates had already created their own Facebook page.
- It featured some frank and personal comments about various issues and managers.
- Not wanting to kill initiative and enthusiasm, HR explained to the graduates how reasonable ground rules and respect for colleagues are necessary within a company. The matter was satisfactorily settled.

In the course of the discussion, the graduates asked, “What is this operating system you are using for Microsoft? It’s so ancient we can’t use it!” This helped speed a decision to upgrade corporate systems from Windows 2003 to Windows 7.
“Five years ago, many of our partners/employees weren’t confident about using the Internet. We’re in a different place now. You have to ensure your staff are proficient at using the technology our customers are using.” Jane Kirton, John Lewis Partnership.

Many L&D professionals told us that adjusting to the needs of young talent was a significant factor in their work. “Even going to a classroom is starting to become alien to the latest generation of graduates,” observed Andrew Smail of Deloitte.

We also found that L&D were often following the lead of colleagues in recruitment, who have to communicate appropriately with the digital generation. However, note these caveats.

- The Generation Y and Z characteristics above are generalised – in reality, cultures and personalities vary.
- Technological aptitude also varies. Although savvy in this regard, most young people are intuitive users, rather than technically knowledgeable. In addition, the rapid evolution of technologies means that ‘younger’ Generation Z people are already having different digital experiences.
- It is simplistic always to assume that orientation to using new technology is age-related.

Experience shows that what counts most is attitude, understanding and the opportunity to familiarise. “I’ve found great variety at Thomson Reuters and now at Dyson,” commented Cathy Doyle-Heffernan. “There are plenty of older people who are comfortable with emerging technologies – and some younger ones who are surprisingly afraid of it.” Others made similar comments.

2.4 Collaboration and knowledge sharing

Collaboration is a major aspect of learning. Here are some overview points.

- Many organisations and sectors have been moving towards collaborative business models through joint enterprises and shared administrative costs.
- Significant cultural shifts are occurring, exemplified by Proctor & Gamble in moving from secretive product development to open discussion and co-development with customers and suppliers – thus relying on better ideas and speed-to-market advantage.
- Improvement is mostly project-driven. Collaboration not only improves project management, it opens up wider dimensions, as United Biscuits CIO, Clifford Burroughs, remarks.
- “Project management is adopting new ways of working. Ten years ago it was expert-led and top-down. Now it’s reversing – and we need to tap into knowledge from the bottom-up. We also need the communication tools that enable it.”
“Most things an organisation needs to learn are already inside the organisation. The challenge is to tap this.” Peter Butler, former Director of Learning, BT.

Knowledge management and L&D

A related aspect of learning and collaboration is knowledge management (KM) – how organisations collect, disseminate and access information to improve operations and competitive advantage. However, there can be difficulties.

- Traditionally, proprietary information is hidden or controlled – whereas learning and improving depends on sharing information.
- The quantities of accumulated information can pose cataloguing and accessing problems.
- How to provide insight not just data is a particular challenge.
- A gulf inside organisations between KM and L&D can exist. At worst, the former has been more about IT systems and suppliers than enhancing human knowledge – while L&D typically has more trainers than experts in organisation capability.
"I can find all these people without having to know which teams or groups they’re in. To me, this 400,000-plus person organisation feels like a small company."  
Sacha Chua, 23, research student, IBM Center for Advanced Studies.

However, the social media revolution has started to help overcome such difficulties, in shaping new generations of digitally connected employees. Hierarchies, management controls and secretive cultures may present obstacles, but there are signs that these are loosening – and a critical mass of people both want, and know how, to get round them. See the column.

The challenge is not just ‘managing’ knowledge – it is about releasing and sharing it through hugely advanced search engine capacity at home and work. The integrated software now available for communication and cataloguing blurs the lines between project support and social media.

Ian Bird, Global Head of Social Media and Informal Learning at IBM, points out that, in his organisation of over 430,000 people with a complex matrix structure, social media provide the best means to profit from collective capability – and accelerate business improvement and innovation. But that should go hand-in-hand with creating the right culture.

Knowledge and social computing

A fundamental point about ‘going social’ is to enable knowledge-sharing through a bottom-up and across, not just top-down, process.

- KM was about codifying and storing explicit knowledge – little attention was paid to tacit knowledge, the know-how people need to do particular tasks.
- However, social computing drives networks of people to access real time expertise for improvement and innovation.
- KM encouraged people to use one particular tool. With social computing, people choose how best to manage their own knowledge with tools that may become embedded in workflows.

Making it easy at Carphone Warehouse

Richard Priddle told us how Carphone Warehouse has been re-configuring its customer offer to provide them with a one-stop shop experience that makes their life easier, rather than feeling ‘sold at’. For staff to be able to achieve this, an easy-to-use, e-learning package is offered in four categories.

- “Get me started” – for new employees.
- “I’m legal” – the information all customer advisers must know.
- “I’m an expert” – core knowledge for all, plus optional content for those wanting to specialise.
- “Develop me” – the soft skills area.

The next step is to make this available, anytime, on tablets and phones, given limited facilities for training at branches. A You Tube-style channel called Eye Openers has been created, providing 30-second videos on the features and benefits of technology for both customers and staff.
2.5 Conclusions

Many challenges are being confronted – particularly concerning systems, attitudes and capabilities. Quite a number in L&D are feeling the strain, with a combination of

- financial and resource pressures
- heightened workloads dealing with current business needs
- the need to adopt and embed new approaches.

However, there is also optimism that the media revolution can make a difference in advancing more informal and collaborative learning.

Ensuring good job and learning functionality creates appeal – to people who want the right tools – and who often point out that these have not always been forthcoming from IT.

See the conclusions in Chapter 3.7 which apply to this chapter as well.
WHAT’S CHANGING – IN APPLYING TECHNOLOGY, SYSTEMS AND CHANNELS?

Topics covered

3.1 Technology platforms and LMS
3.2 Refreshing e-learning and delivery
3.3 Going multi-channel and mobile
3.4 Video
3.5 Going social – and the digital workplace
3.6 Providing devices, ensuring security
3.7 Conclusions

Introduction

Here we review developments in technology, systems and channels, along with their impact on learning and work.
“Our challenge is to build systems that will allow us to inquire, experiment, learn and communicate—and which will encourage us to co-operate. That will avoid the worst that human beings are capable of, and elicit what is best.” Yochai Benkler, Professor for Entrepreneurial Legal Studies, Harvard Business School.

3.1 Technology platforms and LMS

Many interviewees said they were changing or refreshing their learning management systems (LMS). While the costs have to be weighed against the limitations of older systems, organisations expect to be more cost-effective through improvement, savings and operational efficiencies. They also sought to

- enrich and customise their on-line offerings, boost user-friendliness, and adapt better to the new mobile and social technology environment
- consolidate fragmented systems – often the by-product of mergers, acquisitions, geographical spread or federated structures
- integrating learning with performance, talent management, careers and succession planning
- improve their measurement, evaluation and reporting capability.

A danger is swinging too far towards on-line tools – or, indeed, any one method. It’s important to find the right balance. Peter Sheppard said that Ericsson had pushed ‘on-line’ rather heavily but, after feedback, had struck a better balance.

Supply side perspective

The provider market for LMS and outsourcing has grown rapidly and is also changing. See the column for trends.

Quality issues are evident as LMS are the type of HR systems with the highest rate of customer dissatisfaction, according to Bersin Associates’ survey, Bersin Learning Management Systems 2011. Some organisations, BT for example, have reverted to internal resourcing having become dissatisfied with outsourcing.

However, the UK Civil Service has undertaken a dramatic restructuring of L&D in one of the largest outsourcing contracts ever, and chose a single main partner for all its generic training content. See the next column.

The objectives are to save money, remove duplication, improve the blend of services and become founded on a strong belief in e-solutions.

Different systems or generic?

Note that some companies retain different HR/learning technology systems in their divisions or subsidiaries because they wish to be able to disaggregate their group, and sell off or bolt on parts. However this indicates limited synergy.

An alternative argument is that having different business types within the same group should not justify separate HR systems, since many needs are generic – and suppliers explain that their systems should be flexible enough to provide for diversified needs. The investment implications of such judgements are substantial, as are the experiences for learners.

Supply and demand trends

- There is top end consolidation with fewer, more multi-faceted suppliers, but also more specialist entrants, some of whom are integrating vertically to serve specific sectors.
- The fastest geographic growth is outside the previously dominant North American market – and for products, ‘collaborative people systems’ is a growth area.
- Businesses are fiercely debating whether to outsource data storage and access to Cloud computing, which makes it easier to provide anytime, anywhere access.
- The advantages to users include lower overheads and greater scalability – though there are concerns over security with implications for risk management.
- Outsourcing content provision is another developing market, mainly for generic skills and standardised technical training – especially in regulated industries.
- However, some suppliers are moving upstream, for example on-line ‘soft skills’ services have also expanded to support blended development approaches.
A key decision is what learning content roles and capabilities to retain internally, as opposed to hiring in and outsourcing. For several interviewees – Deloittes, IBM, Ericsson, for example – significant internal proprietary expertise and intellectual property has to be protected. Being able to design and publish top quality learning content requires particular skills, as discussed in Chapter 4.5.

3.2 Refreshing e-learning and its delivery

Reviewing the state of e-learning for this report, we found that many observations in CRF’s 2001 report, Corporate E-Learning, remain relevant – advice on distance learning, for example. In some instances, little has changed. Indeed, many companies have only recently begun to make their intranets more interactive and engaging. Note these two comments.

“Too much e-learning fails to use the potential of computers and software, and only touches the surface of what a computer can do. Some organisations adopt it just for cost-saving reasons. More could be done if they really embraced it – and integrated it into a holistic approach to development," explained Clive Shepherd, Chair of e-Learning Network and the Digital Forum.

“We have to become smart at content management. We put lots of material into an e-format five years ago, but we find now that much is redundant,” said Simon Gibson, Head of Learning, Group Functions, Royal Bank of Scotland.

However, much work is now underway to modernise corporate learning portals – adopting new functionalities, re-designing content, and improving how e-learning blends with other development methods. Stimuli for this include:

• demands for better training from regulators
• trainees becoming more au fait with digital communication and services
• the ‘trackability’ that e-learning provides.

“In the past we made people use e-learning. Now we want to engage them. It becomes so much more effective,” said Mel MacIntyre, Head of Learning, Standard Life.

In searching for the right balance when deploying e-learning, there is much debate about classroom versus non-classroom training. Technology now offers alternatives, including virtual classrooms, though at times there is no real substitute for meeting face-to-face.
There are huge benefits to be gained from enabling your workforce to be mobile. Not only does it foster trust between organisations and employees but, allowing staff to shape their own working environment gives them back one of their most valuable resources – time.” — Ann Pickering, Director of HR, O2.

The proportion of face-to-face should be highest when the objective is to shift culture and behaviour, while skills development can be achieved through a combination of distance and inter-personal learning, as shown in the diagram below. Learning professionals also point out that digital natives may have underdeveloped social skills if they only communicate on-line.

3.3 Going multi-channel and mobile

Rethinking e-learning is only one dimension of improving the delivery of distance learning. To achieve higher usage and satisfaction levels, organisations realise that different ways for learners to access content are needed.

When BT investigated employee usage of Internet browsers some years ago, it found that many preferred access to learning materials and corporate information at weekends, mostly on Sunday evenings. The company has a significant proportion of home-working employees (10%) and those working remotely (30%) – executives, engineers, etc.

BT overcame trades union opposition in principle to home-working. Transport for London faced such opposition to working in your own time – but that is precisely what has made its My Learning portal popular.

- Many employers have flexible work practices, given travel issues and employee preferences.
- Even after resolving trade union or security issues, most have started cautiously when offering employees – not just senior executives – home access to company systems.
- In 2012, it cannot yet be assumed that all have PCs or tablets, and broadband access at home.

Performance support

- For years, Bob Mosher and Conrad Gottfredson have championed the importance of supporting workplace learning.
- “Performance support is providing intuitive, tailored support at a moment of need to ensure the most effective performance,” they say.
- There is huge value in rapid access to job-support information – learning on a ‘just-in-time’ basis, whether from on-line documents, chat groups, video or people networks.
- By contrast, traditional training has been pre-programmed, takes time and relies on predicting what employees need to know. This is still relevant for generic skills and professional training.
- But in fast-moving, unpredictable work environments, reliance on this alone is inadequate – and often, trainers don’t have the much-needed practical and up-to-date perspectives of front-line staff.
- Hence mobile learning and social media are particularly valuable in meeting day-to-day and short time-scale needs in a way that traditional trainers can never do.
- By 2012, providing mobile performance support has become a pre-occupation for suppliers and their clients in IT, communications and L&D.
IT functions are concerned about the storage and bandwidth implications of internal systems, as they become larger and cheaper to enable widespread video usage.

Organisations tend to start by indicating that ‘training’ at home is optional and, after a while, they generally find this becomes a non-issue.

Going mobile

There are countless ways that employees with mobile devices improve productivity. For example, BT is equipping engineers with smartphones because they do not need the boot-up time required by laptops.

Much of the technology supply industry in 2012 is fixated with mobile, and major conferences on learning technology include some specifically for mobile learning – mLearnCon, for example. Much the same is occurring in recruitment.

Because mobile reception can vary, it is advisable to ensure alternative access via fixed-line – L&D must be alive to this to avoid user frustration – though in under-developed countries, mobile can be more reliable. The advent of 4G will provide an additional boost to the appeal of mobile learning.

By 2012, advances in smartphone capability – and the spread of tablets and netbooks – offer a better user experience. Blackberry is being consigned to history, while Android and Apple devices are currently dominant. In this context, the design skills to re-shape learning for mobile usage are much in demand.

3.4 Video

Video has long featured in training, but it has become more pervasive in social and work applications because of new capabilities in cameras and phones, the emergence of You Tube and advances in video-telephony.

- Some L&D professionals have seen the value of adapting these developments for learning and problem-solving – encouraging employees to make and distribute their own work videos showing how they identify and resolve practical issues. See the column.

- Sometimes, they distribute low-cost Flip or equivalents but, increasingly, employees have their own devices and need minimal guidance.

- Such videos can become part of an organisation’s knowledge bank, with internal search engines and readily accessible social media. While the cost is minimal – the potential benefit is almost incalculable in time saved, rapidly solved problems, and reduced training costs.
“Social media dis-intermediates – it crosses and by-passes hierarchy. That’s inherently frightening to yesterday’s managers, so often wedded to command and control, and resistant to transparency.”

Clive Shepherd, Chair, E-learning Network.

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**BT dares to share**

In 2009, BT launched its Dare to Share initiative to encourage organisation-wide sharing. A social media website now enables peer-to-peer collaboration and knowledge sharing as employees create their own learning content – it’s like an internal You Tube of learning. Participation in Dare to Share is still building.

As a communication medium, video is now cheap, fast and has impact. It can add significant value to learning and sharing, and accelerate business improvement.

**3.5 Going social – and the digital workplace**

Social media are a group of communication software tools that enable widespread information sharing. While varying in function – Facebook and Twitter, for example – they provide platforms for facilitating social learning, and for collaboration and common action by linking diverse groups of people.

Effective social media tools must have these characteristics – participation, collectivity, transparency, independence, longevity of information and a capacity to evolve.

Our research revealed two extremes of organisations embracing social media – with most somewhere in-between.

**FULL ADOPTERS** – a few companies describing themselves as ‘social organisations’. They have the philosophy and systems to enable transparency, along with vertical and horizontal information sharing. See, for example, the IBM case in Chapter 5.

**REJECTERS** – organisations whose leaders resist investing in systems that encourage free flows of information and emergent collective action.

Note the difference between using social media and claiming to be a social organisation. This cannot just be declared – it involves much more than that. See Michael Fauscette’s blog, Social Solution Maturity, with a model of how to mature into a social business.

Adopting social media

We found that many organisations have started reactively.

- They realise that customers are commenting about them on social media channels – and so decide to create a marketing and PR presence, mainly for defensive reasons, including copying competitors.
- Meanwhile, HR and recruiters have reacted to new generations of employees by creating Facebook pages and other tools as part of their attraction strategies.

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**Video-conferencing and video-telephony**

Though hitherto expensive and not particularly user-friendly, video-conferencing is changing.

- Skype and its rivals have enabled wide adoption of basic video-telephony at home and work.
- Cisco has introduced an advanced video-conferencing experience through ‘tele-presence’ for top-end users – with competition and reduced costs, a wider take-up may result.
- Cisco is also promoting a package of integrated products that, it says, “converges social, mobile, video and virtual communications capabilities to create the new collaboration experience”. Rivals appear to be competing for the same space.
- The potential of such facilities is already evident among early adopters. Internal connectivity between leaders, employees and teams – and in learning processes – is vastly improved in both quality and depth.
- An example is the blending of face-to-face learning with document sharing and screen-capture. Also, virtual classrooms and coaching can be more productive.
- Apart from convenience and speed, the economies offered are attractive, with added benefits in security and reduced ‘carbon footprints’.
Only gradually have some organisations started to allow employees to use social media — for example, when supporting marketing and customer care, and L&D providing group pages for new graduate groups, or participants of management programmes.

Quite often employee groups initiate their own sites and pages to share knowledge and learning, with IT staff and R&D functions being early adopters. Local management teams in a large organisation may experiment in their division or geographic area. Thus we found that social media adoption tends to be tentative, opportunistic, bottom-up and even ‘wildcat’ – rarely does it appear to be strategic or planned.

It is often regarded as a communications issue rather than about working more effectively.

Some senior managers initially perceive it as ‘nice to have’, until they recognise the market and customer potential. Internal usage is typically an after-thought.

Only a minority of organisations have early informed discussions about social media and how technology and human behaviour inter-relate – or about the business advantages such as collective learning, facilitating change, cost savings, process improvement, innovation, supporting globalisation and fostering a common culture.

Social media – mistakes to avoid

- Being tactical, not strategic – jumping in without working out how to obtain value.
- Neglecting content – focusing on the medium at the expense of the message, for example.
- Not prioritising listening.
- Being in the goldfish bowl – not realising the significance of being observed.
- Trying to ‘control’ participants.
- Trying to market at, rather than with, participants as partners.
- Not being prepared for active participation and rapid response to demand.

Social media – practitioner views

Some organisations learn the hard way about introducing social media. A common mistake is to create a ‘corporate’ facility that is policed and ‘official’.

As the UK Civil Service found when Civil Service Pages foundered, social media works best when the participants feel they own it. Note these practitioner comments.

“You can control social media no more than you can control what people think and say. There is no Plan B – technology will progress, but social media is here to stay. The only choice is how to manage it.”

In almost four years of using blogs I’ve come to know two or three times the number of people I knew in the six years when I wasn’t blogging – even though I’ve gone from working in the office surrounded by colleagues to working at home in the middle of nowhere.” — Luis Suarez, social media champion, IBM.

- “Accept that social media must be self-regulating,” noted Bev Cunningham of CSC. “A company should get over to employees what it means to be a good corporate citizen, and it always has its performance management system in mind. However, it is pointless trying to control these channels.
- “CSC believes in creating the right work atmosphere, having clear objectives, and trusting staff to behave professionally.”
- At Waitrose Supermarkets, which has a high proportion of student and part-time employees, Jane Kirton explained: “We’ve become more relaxed about Facebook, and our staff have a site for both learning and networking purposes.
- “We found a softly-softly approach works best because management, HR and Communications feel they are in uncharted waters, or they are sensitive to not forcing social media on people – or both.”

Pharma company, Lilly’s ‘Loop’ is a global Facebook equivalent. Rather than launching with a big promotion, it was piloted and grew organically. Initially, it was offered to learning programme attendees to stay in touch, share and continue peer learning – thus maintaining the energy of what had been learnt.

“On-line connecting isn’t for everybody, but we’re pleased with the take-up,” said Louise Sibley, a senior learning consultant at Lilly. “We have the usual range of users – active, occasional, voyeurs. Loop is now being used for feedback and discussion of serious topics. Also, ‘Litter’ has been launched – a Twitter equivalent – but take-up hasn’t yet been as extensive as Loop.”

- Some organisations choose DIY solutions rather than investing heavily in bespoke systems. For example, departments may create their own Facebook and Linked-in pages.
- However, this is not an integrated approach. More sophisticated products are available off-the-shelf, such as Yammer, National Field, Jive and Chatter, specifically designed for corporate users.

Clifford Burroughs, CIO at United Biscuits, explains that these programmes “have the inherent advantage of requiring little learning time because they are intuitive. Ease of use has made them pervasive – compared with the highly-engineered systems many companies have installed. Likewise Apps are bite-sized, compared to complex corporate software. The message is ‘no training required’.”

Towards the digital workplace

In considering whether organisations are shifting towards the digital workplace, we found a mixed picture. Jane McConnell’s Global Digital Workplace Trends 2012, provides pointers. It reports that a mere five per cent of global companies surveyed say social computing is well-established throughout their enterprise, while another 17% say it is well-established in some parts.

Reflections on social media

In their book, The Social Organization, Bradley and Macdonald make these observations.

- “When organisations make social media available and nothing meaningful happens, they blame the tools, conclude it lacks business value, or assume their organisations aren’t ready.
- “More often than not, the truth is more basic – they didn’t do it right.
- “They didn’t invest or prepare properly. They treated social media like some collaboration panacea driven by technology so naturally attractive that it could succeed on its own.
- “That’s the bad news: social media succeeds by itself only once in a blue moon.
- “But there’s good news as well. There are many collaboration practices and techniques successfully used in organisations of all sizes, industries and cultures.”

In a Financial Times interview, they remarked, “There is a common misperception among business leaders that all you need is a Facebook page and a Twitter account and then, voilà, your organisation is social.

“ This is a limited and dangerous view. The vast majority of significant — even transformational — business benefits of social media come, not from marketing communications, but from productive communities.”
Companies are in the early stages of learning how to integrate social features into business activities. Nearly 60% are still concerned about information quality, data privacy and security. Forty per cent have new concerns about organisation silos being rebuilt on social platforms – and 30% are concerned about the work culture differences between digital natives and the older generation.

Note also that the context of any digital workplace is as important as functionality – and as much time, or more, needs to be spent on the human systems and culture as on technological features. As Clive Shepherd of the E-Learning Network comments, “many organisations adopt mobile devices quite quickly. It’s the social media they struggle with because that’s about behaviour.”

### 3.6 Providing devices, ensuring security

We found many organisations wrestle with two inter-connected issues before being able to fully adopt new learning and collaboration technologies: whether to supply employees with devices, or allow them to use their own – the bring-your-own-device or BYOD debate – and the security issues that this might present. Here are considerations for the first issue.

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- Forty per cent have new concerns about organisation silos being rebuilt on social platforms – and 30% are concerned about the work culture differences between digital natives and the older generation."

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#### Examples of equipment supply

- GSK has distributed smartphones to 50,000 sales staff, half of its workforce. That begs the question of how the other half feel – and also how to plan mobile learning content.
- Retailers – from John Lewis to Carphone Warehouse and supermarkets – all have issues about store staff having the time and space to use PCs for communication and e-learning purposes.
- Home access cannot realistically fill the gap. Tablets have advantages over PCs in a retail environment – and smartphones are likely to become a viable channel over time.
- CSC has decided to rely on staff using their own communication devices, given that it has a technology-savvy workforce. A small financial allowance is available, as well as guidance on what is needed to work effectively with company information.

#### Useful practices

More often it is the case of dispelling fears because leaders and managers just don’t know enough and no common understanding exists for the ‘right thing to do’. There is no substitute for building experience and learning from others.

“Some leaders and compliance personnel set the security bar far too high for IT. They want to be bulletproof. We’re not all NATO.” **Clifford Burroughs, CIO, United Biscuits.**
“Time-wasting on social media is a management and culture issue, not a technology problem.”
Don Taylor, Chairman, Learning and Performance Institute.

- A useful practice is to run tests to build confidence – for example, Dyson initially tested the use of Sharepoint with its Legal function.
- Some organisations bar access to external social media – at least for most employees – and provide their own internal media instead. This has cost implications, along with the challenge of designing and implementing to an equivalent standard.
- Much learning material is non-proprietary and generic. It may also be bought-in. Lower levels of clearance can be applied, giving trouble-free access at home or on the move.
- Over-enthusiastic social media users can say unfortunate things, and are often ignorant of the law. Companies should provide guidance and reasonable ground rules. Software advances also mean that all written material is now highly traceable, as is access to systems. Many organisations have sophisticated methods to identify unwanted practices and so protect their interests.

We conclude that security concerns are generally exaggerated. While there are technology precautions to take, it is more about an effective management culture.

### 3.7 Conclusions

For many, 2012 is a pivotal year in L&D as regards reviewing their strategy and adapting to new technology. To match the pace of change and meet resource constraints, they need to speed up content development, and champion peer learning and knowledge sharing.

Improving internal collaboration, and leadership’s ability to engage staff, are two other common priorities.

Additionally, leaders and L&D need to focus on the human context for success as much as changing structures, technology and systems. For most organisations, this is work in progress.

Note, too, this advice from Anna Akbari, Professor, Media, Culture and Communication, New York University. “In a social business, employees reconstruct their own reality (and that of the organisation) through a mash-up of individual skill-sets, expertise, and personal viewpoints – rewriting the manual for how work gets done.”

#### Search and tagging advances

- On-line practices have now widely permeated life in academic institutions. An obvious hurdle was the potential for plagiarism – but by using sophisticated software, this possibility is all but eliminated.

- ‘Search capability’ of this kind obviously has wider value in protecting proprietary and sensitive information.

- However, for learning and collaboration, the converse applies. It is sharing that is valuable, through search engines enabling access to, and copying of, colleagues’ information.

- Advances in ‘bookmarking’ or ‘tagging’ are crucial in helping employees to organise and then share material.

- Sacha Chua, researcher at IBM says, “With DogEar and tagging I can keep over 3,000 bookmarks, get back to them easily and also share them with others. This also means that other people stumble across them and get in touch with me.”

- Global Digital Workplace Trends 2012 identifies ‘super-search’ capability for employees as a growing priority in global organisations.
Having taken stock of L&D in the context of the media revolution, this chapter examines future good practice.

Topics covered

4.1 Recommendations for L&D strategy
4.2 Convergence – the critical enabler
4.3 From blended to integrated learning
4.4 Implications for L&D functions
4.5 L&D structure, roles and capabilities
4.6 The other key actors
4.7 Culture and capability
4.8 The business case – and measuring impact
4.9 Governance implications
4.10 Looking to the future
4.11 Recommendations
“We encourage people to contribute to strategy, so we need good communication channels that enable business improvement.” Neil Imber, Deloitte UK.

4.1 Recommendations for L&D strategy

For CRF, the watchword for effective L&D is ‘business focus’ – as covered by the 2008 report, Business-Focused Learning, and confirmed by L&D professionals we talked to. There are three essentials.

L&D strategy – embedded in organisation strategy
This is more than identifying the training implications of business objectives. It involves being part of debating strategy; ensuring it addresses culture, capability, improvement and work effectiveness; and helping strategy formulation to become a learning process.

L&D purpose – improving organisation performance and capability
Analysing and solving current business challenges and developing future capability. Enhancing the organisation’s ability to learn and develop itself by improving learning culture and processes – not just delivering training courses.

L&D effectiveness – measured by contribution to business results and improved value
The impacts on business outcomes and the performance factors driving these – showing how improved capability of individuals and teams enhances the value of the organisation

In considering these essentials, our guiding principles for L&D strategies are in the column.

4.2 Convergence – the critical enabler

Increasingly, learning processes are inter-connected with those for communication, collaboration, business improvement and innovation. A theme of this report is that distinctions between these areas are becoming blurred – or converging – as shown in this diagram. Also,

- L&D and communication executives are starting to collaborate, using social media as an integrated platform for knowledge sharing, learning and messaging
- project management, collaboration and communication software are integrating, with some suppliers now offering ‘complete solutions’
- social media are being more widely used for problem-solving and facilitating innovation.

### Principles guiding L&D

- Responsibility for developing yourself – although not new, it is now more relevant given the increase in on-line resources.
- ‘Pull’ not ‘push’ learning content – tailoring content to user needs to make it appealing.
- Respecting user choice in accessing learning content – connecting when it suits, whether at home or work, at a desk or on the move.
- Managers being learning leaders and coaches – technology offers new tools to guide managers.
- Facilitating collective and viral knowledge sharing, learning and collaboration.
- Recognising employee achievements in learning that lead to business benefits, using performance, reward and recognition systems.

### Convergence

Learning → Improving, Innovating

- Products and services
- Processes
- Organisation

Social media

Communication → Collaboration

Feedback loop
"Culturally, we have a problem with what people understand about ‘learning’. We don’t get enough focus on ‘development’."  

Craig Yetter, GlaxoSmithKline.

Deloitte UK Head of Learning, Neil Imber, points out that everyone in his firm ‘gets it’ [collaboration] – from leadership to the consultants who advise clients on improving their organisations.

“What’s more, we encourage people to contribute to strategy, so we need to have good communication channels that enable business improvement and the flow of ideas.” See the case study in Chapter 5.

For IBM, also a case study, selling software and advice to facilitate connectivity is their business. Many thousands of staff now participate in product testing. In recent years, a close working partnership has developed between HR (Talent & Learning), internal IT and IBM’s software development group – all seen as intrinsic to becoming a ‘social enterprise’.

4.3 From blended to integrated learning

Convergence also applies to development, through the practice of blending – combining different learning methods to suit organisation and learner circumstances.

Interviews revealed that L&D practices vary considerably in this area.

"We are still in the infancy of working out the right level and type of blending," said a learning head in a major financial institution that spends heavily on training. Also, L&D tends to be more experienced in blending for management development than for specialist technical areas.

Despite this, we discussed with learning company, Intuition, the idea of ‘moving from blended to integrated learning’, which is

- continuous ‘drip feed’ learning, not programmatic
- closely linked with work processes
- founded on aligned organisation and team/personal goals
- highly self-driven
- rich in feedback.

Integrated learning is more than just ‘on-the-job’. Guided by employer branding principles, it is a holistic approach to learning from all aspects of being at work – throughout the life-cycle of employment. The development path in the diagram requires good performance management, an effective learning infrastructure and collaboration between L&D and Recruitment to create a comprehensive digital relationship with employees.

Shifting the L&D emphasis

Traditionally, L&D functions felt they could regulate what people learnt. Content was developed, approved, filed and distributed in a controlled way.

- This no longer applies. The explosion of learning content on publicly-available channels is boosted by a similar growth of apps for mobiles.

- Organisations are stating to adopt as ‘policy’ that people can learn from anywhere.

This shifts the L&D emphasis to

- managing suppliers of external content
- becoming expert in facilitating internal content development
- clarifying what is proprietary and what is needed for compliance
- developing editing and production skills for the web and mobile apps
- building employee skills in acquiring, sharing and cataloguing knowledge.

L&D professionals should understand how technology developments relate to these points.
L&D is at a crossroads. It needs to avoid slipping into redundancy.” Don Taylor, Chairman, Learning and Performance Institute.

4.4 Implications for L&D functions

Asked about the suitability, capabilities and influence of L&D to tackle the challenges emerging in this chapter, L&D experts appeared disillusioned and critical, as the column reveals. Interviewees agreed that L&D should be more

- proactive in devising business solutions
- connected with strategic talent management
- capable of ensuring effective change management
- knowledgeable about work processes and how to improve them
- skilled in OD and consulting
- knowledgeable about how to exploit technology, and lead projects
- courageous and persuasive in presenting business cases
- skilled in facilitating informal learning
- able to influence behaviour at the top.

Owen Ferguson of Goodpractice points out, “Sometimes business units approach us with projects, and HR and L&D seem not even to be in the picture.”

By contrast, L&D is well-regarded where it works closely with operational staff on learning issues. Yet in some organisations, leaning too much towards this approach has left gaps in L&D overview, with weak L&D leadership at Group level – particularly in federal structures.
“L&D should move more to a position of enablement than command and control. However, the business culture has to move as well, or the shift becomes very hard.” Simon Gibson, Head of Learning – Group Functions, Royal Bank of Scotland.

It was also felt that L&D heads often lack influence on executive teams and boards. This contrasts with people like Steve Kerr, for example – a powerful architect of GE’s growth and development. It doesn’t help if the HR leader is not particularly OD-capable, which makes access to the top problematic. See the column on the ‘chief learning officer’.

Despite these complaints, we also found
- increasingly, business strategies explicitly prioritise learning and collaboration to improve competitive capability
- some HR leaders are driving agendas for improved culture and capability, including better collaboration and use of social media
- L&D functions wanting to raise their game
- technology being particularly helpful for L&D to be both ‘global’ and ‘local’.

As one L&D head said: “We’ve been guilty for the last three years of reacting to business needs and just delivering programmes. We should become more strategic.” Advises Peter Butler: “Success in L&D is not about having a solution looking for a problem. Go to someone in the business with a sticky challenge that L&D can solve. Don’t wait to be invited to the table.”

4.5  L&D structure, roles and capabilities

Considering the shortcomings discussed above, a new vision for L&D functions and core skill areas is emerging, as shown here.

The Chief Learning Officer

Do organisations always need a CLO or its equivalent? CEOs don’t want too many in the C-suite, and HR leaders don’t welcome rivals for attention. However, pertinent questions are
- who is responsible for the organisation’s overall learning process
- where is the expertise in building learning into business improvement, change and innovation?

Boards and investors in any organisation, serious about effectiveness, competitiveness and sustainability, should require answers to these questions. Whoever acts as a focal point for these issues must have
- advanced business analysis and strategic skills
- depth in OD and organisation psychology
- personal presence and courage to challenge conventional wisdom and shift behaviour.

Success will be judged by their ability to foster meta-learning in the organisation and thereby enhance its performance. A CLO may be unnecessary if the CHRO becomes a ‘Human Systems’ director, with a broad remit over how work is done – something Google is trying.
“As the pieces of companies become densely inter-connected, the differences between knowledge management, training, collaborative learning, organisation development, internal communication, and social networking fade away.” Internet Time Alliance.

**New** L&D roles

**Learning designers**
- Expertise in blended and integrated learning and development.
- Working with HR heads, HRBPs and line management to devise solutions.
- Expert sourcers and buyers of external services.
- High quality designers much in demand.

**Learning content specialists**
- Understanding of user and organisation needs.
- Expertise in sourcing knowledge from internal and external sources.
- Interpersonal and editing skills to work with sometimes difficult internal experts.
- Skill in using communication channels.

**Learning technologists**
- Combines learning and technology expertise.
- Expertise in managing technology implementation.
- Keeps L&D and HR up-to-date with developments, thus influencing strategy.
- OD and transformation expertise in leading the L&D function – the CLO in 4.4 – and ensuring that HR leaders and business partners are OD-trained and able to facilitate L&D.
- Organisation analysts with expertise in data management, surveying and other research.
- Change facilitators working directly with teams and on projects.
- Trainers – some may still be full-time, but often these will be bought in.
- Coaches – internal accredited coaches, external coaches and distance coaching.
- Heads of academies – leaders of learning in specific parts of the business or functional disciplines like engineering, distribution, technology, etc, and heads of profession for specialisms.

These roles are starting to appear in interviewed organisations – for example, some have appointed HR and L&D technology experts, and created specific responsibilities for asynchronous and digital learning. Also, Don Taylor of the Learning and Performance Institute advised us that they will publish a new skills map for L&D in 2012 which will reflect these developments. He says, "L&D is at a cross-roads. It needs to avoid slipping into redundancy. Its strength should be in knowing how people learn. Its challenge includes understanding how to engage with both leaders and managers."

**Internal centres of excellence – and COPS**

There are many approaches to develop internal centres of excellence and learning, and thence the desired range of managerial and specialist talent needed. For example, Ericsson has academies for different capability areas, such as sourcing, leadership and technical. Each has a head of ‘competence-readiness’, whose remit is to prepare staff in new products and technologies so they are ‘customer-ready’.

Similarly, Lilly’s university has evolved into separate functional institutes – Marketing, Sales, Research and Animal Health, for example. There are also a School of Manufacturing and another for general management and administration performance.

These structures are becoming more virtual and social, requiring
- cataloguing web resources and converting knowledge into coherent and user-friendly offerings
- good links with staff-led communities of practice (COPs) to enable the formal to work better with the informal
- local touch-points rather than expensive bricks-and-mortar learning centres.

COPs have always been suited to social media. Now, everyone is learning how to set up and maintain them, whether on LinkedIn or Facebook or in-company sites. These can number many hundreds, and they work best informally. "We even have a community on excellence in COPs,” said Ian Bird of IBM, as does BT.
“Every organisation has managers with varied people skills. We need them to be responsible for continual learning. That’s a core challenge for our leadership development.”

Craig Yetter,
GlaxoSmithKline.

4.6 The other key actors

Our research identified implications for key players other than HR/L&D in adapting to the effects of technologies on learning and work.

Senior leaders

The importance of leaders cannot be under-estimated, as Bradley and McDonald said in The Social Organization. “Organisational success with social media is fundamentally a leadership and management challenge, not a technology implementation.”

We came across CEOs who visibly champion a culture of learning, collaboration and transparency, and who are practised in using video, blogs and social media – compared with town hall meetings, paper, mass e-mails and newsletters of the past. Crucially, as leaders of top teams, they must role-model good development for their key reports and managers in general. Equally, we found that some still need to understand the theory and practice of learning and development, and who have much to learn in setting a personal example.

It’s not just about CEOs – heads of business areas and functions serve as role-models too. For example, Peter Butler described the message coming from the finance director at Lloyds Bank when launching its finance academy. “HR and L&D were not on the platform, despite the amount of their preparatory work. He owns developing finance people.”

L&D should have the courage, skills and business arguments to facilitate leadership culture change, as well as acting as ‘high level’ leadership development designers and business improvement facilitators. The column shows our four priorities emerging from research in selecting and developing leaders.

As a practical example, Louise Sibley described how Lilly ran its first virtual leadership development programme aimed at improving the engagement performance of 1,700 senior managers worldwide. Participants were encouraged to use social media as a peer learning tool, and took part in a webinar called ‘How does social media impact my work as a leader’?

“Leadership is about giving others the chance to flourish. You do that by asking questions. More than ever before, leaders can’t know everything,” the writer and coach Gary B Cohen advises. “By seeking others’ input, they can inspire powerful and positive change.”

IT functions

These functions should be lead advocates of implementing technology and, in some cases, they are. IT staff also tend to be early adopters of social technology. However, interviews reflected frustration with IT. “If I want to make things happen with new technology, I wouldn’t go to IT. They know how to say ‘no’, and can never say ‘yes’,” said one Head of L&D.

Four priorities for L&D – and leaders

1. Emergent strategy – leaders must understand how rapid shifts in technology impact on behaviour inside and outside their organisations, and ensure flexible strategy formulation. Their own behaviour will change as they learn to live in a goldfish bowl.

2. Authenticity – faking role-modelling, messaging and listening will be detected and invites scepticism, as will just dabbling with Twitter, blogs, and so on. Poor use of social media is counterproductive and has led to unfavourable press comment.

3. Regular and honest communication – people trust their leaders if they have evidence that they listen and invite involvement. Setting an example in learning is important – including admitting mistakes – and employees will expect other managers to do the same.

4. Engagement – an explicit focus on improving leaders’ engagement capabilities – particularly with today’s change agenda and economic climate, including use of communication tools.
Criticisms included retaining legacy systems, inflexibility, a tendency to over-engineer, a pre-occupation with security – and being more concerned about the technology than learning and collaboration goals. Discussions with IT reveal a different picture – such as their own frustrations with leadership and users in trying to determine needs, and the contrast between their constraints on resources on the one hand and high expectations on the other.

Corporate and internal communications

Another crucial player is the Communications function. Typically, they already are active in using social media with external audiences with, or on behalf of, Marketing.

Varied reporting lines can be problematic. Where organisations have created Heads of Social Media, they may report to Communications, and in others, to HR. Elsewhere, HR oversees internal communications, or has its own communications specialists. However, ensuring there is a healthy partnership between the various departments, around common business goals, makes reporting lines less significant.

In organisations with a genuinely holistic, internal and external social media strategy, good collaboration with Communications is the norm. In others, the picture is more mixed.

Some functions tend to be control-oriented – a sign of under-developed internal communication competences, which may also reflect the prevailing management culture. In such instances, HR/L&D should be proactive in educating colleagues in OD principles and assuring them that risks can be managed.

Managers

In implementing 70/20/10 and adapting to new technology, the role of managers is critical. As ‘people managers’, their behaviour can either inhibit or foster learning. They may need support – and their own learning orientation should be considered in making appointments. Any technology limitations will have to be addressed. Managers should understand the key principles of learning theory and practice which L&D should provide.

4.7 Culture and capability

We found consensus that making best use of technology for learning and collaboration is more about culture than technology. If strategy prioritises collaboration and learning, senior leaders must demonstrate the desired behaviours and setting personal examples, as silos and internal competition start at the top. Decision-makers also need to be explicit about how technology is to be used, and identify related priorities.

While many organisations have a voluntary approach to introducing social media tools, it is advantageous for people to be ‘in flow’ by using common systems – and to build their own competence in using technology. See the next column for useful practices.
“There’s huge, untapped potential in most companies – and the flipside is vast dysfunctionality and wasted energy. Corporate culture needs re-inventing. It’s not a technology issue.” Clifford Burroughs, CIO, United Biscuits.

Culture principles

Culture also plays an important part in security. Be aware of these points.

- Employees understand positive and negative collective action, so establish ground rules of behaviour in consultation with them.
- Social media should be self-regulating – however, anticipate issues, foster debate and get people to understand where dangers lie.
- The more employees feel like partners on a collective mission, the more cohesion and alertness over security there will be.

The concept of three levels of risk management teaches that the disciplines and culture of front-line staff and managers represent the first level of protection. See CRF’s report, Managing the People Dimension of Risk, for guidance. This certainly applies to the use of the Internet and social media.

- Many corporate mishaps stem from poor communication practices, with risks for both reputation and productivity. For example, much e-mail overload is due to this, which is an issue that L&D should be addressing.
- With so many media channels, common standards for messaging and networking must be agreed.

Finally, while there are tensions between openness and security, and intelligence-gathering and sharing, this need not inhibit learning and collaboration. Combining common disciplines and sophisticated security technology can keep organisations both safe and effective – providing a common purpose has been established, as IBM have done.

Good ‘social communication’ disciplines

These social media communication initiatives emerged from our research.

- IT and HR jointly providing a clear and updated policy on information security, supported by training.
- Security becoming everyone’s responsibility, with contractual consent for reasonable rules and assessment of compliance.
- Clear guidelines on communication with external audiences with everyone acting as an ambassador.
- Knowing when to rely on agreed spokespeople and in which circumstances.
- Ensuring everyone knows the law – libel, for example.
- Continually updating staff about good and poor social media practice.

Useful practices

- Technology companies like Ericsson and IBM formally expect their people to demonstrate digital competence – through being active and visible in sharing information and ideas, for example.
- As every organisation is an increasingly intensive technology user, any lingering technophobia can be a liability. Explicit training in tools is important.
- IBM fosters champions of new practices who act as evangelists to influence clients and users.
- The key factor in accelerating take-up is to introduce user-friendly, intuitive systems and practices.
- Ease of use is why publicly-available tools are now widespread – productivity for knowledge workers links directly to reducing time in searching for the right information and right person to talk to.
- Some organisations have recognised the talent of digital natives, and have given them responsibility for helping people become smarter at technology. Just occasionally, upward mentoring of top executives takes place.
- Data on take-up will give a picture of disposition to technology in different parts of an organisation.
- However, note that some technology companies suffer from too many technology ideas and initiatives – their challenge is to focus.
“Learning professionals who have the ear of senior management … know that every conversation should include information about money or time saved, revenue or new business generated, or customer problems solved.” John Cone, former Chief Learning Officer, Dell.

Three levels of benefits

Anticipated benefits for business cases, and end-results, can be assessed in three categories.

Social

- Essential elements for organisation effectiveness – such as connectedness, collaboration, collective intelligence, trust and co-ordination.
- None of these performance drivers guarantee profits, but they have to be in good shape to influence them.

Performance indicators

- Examples include:
  - responsiveness of customers and other target audiences
  - operational effectiveness
  - supplier/business partner effectiveness
  - improvement and innovation measures
  - cost and waste reduction
  - brand value and reputation
  - employee engagement
  - talent pipeline
  - talent effectiveness.

Performance results

Defined organisation outputs and end-results, such as revenue and market growth, profitability, competitive position, and regulatory approvals. The ultimate aim is greater sustainability, by being a more innovative, agile survivor.

- Working with technology-smart employees to devise policies.
- Staying up-to-date with security advances, and applying them sensitively.

“We’ve had to teach our partners/staff not to respond to customers on social media channels. That’s best left to a dedicated communications team,” said Jane Kirton at John Lewis Partnership.

4.8 The business case – and measuring impact

Numerical and financial literacy has traditionally been an Achilles heel of HR and L&D, as previous CRF reports have identified, which affects relationships with management teams and boards. There tend to be few science and maths graduates in HR.

“L&D must speak the language of its stakeholders. A failure to do this will render it marginalised at best and irrelevant at worst,” observes Charles Jennings of the Internet Time Alliance.

With good training needs analysis, L&D should be able to present business cases and assess results. Greater use of technology actually makes the measurement of L&D efforts easier – that is, how new communication technology and related practices contribute to learning and collaboration.

- Usage data is easy to obtain, offering insights into issues and trends – and many types of reports can be generated for learners, managers, L&D and management. Also, feedback mechanisms are easy to use, and can provide assessments of development activities.
- Employee surveys are a particularly useful source of information. Software now offers new capabilities such as pulse and sentiment analysis tools.

However, it is always harder to assess the RoI of development activities, particularly with social media. For many organisations, in 2012, it is also too early to tell.

Ascertaining business impact

There are other ways than financial RoI to judge business impact, as the column shows. As often in measurement, direct cause and effect relationships of improved learning and collaboration practices cannot be established – though linkage and contribution to end results can be identified. Whatever measures are used, they must tie back to organisation objectives. Numerical measures can be defined for all three categories in the column.

‘Opportunity cost’ should also be estimated – the costs of not investing in development and communications, and related technology.
Note that the leadership of a firm like Deloitte with its accounting heritage, might be expected to be keen on quantitative data to review progress. Yet, they are content with anecdotal data and stories from staff as evidence of the quality of development. Also, client feedback and reaction provides information on investments in collaboration activities.

The Kirkpatrick framework was referred to frequently in our interviews. Many organisations are still working towards Levels 3 and 4 – as they were over ten years ago when CRF first devised its HR evaluation model!

“You can’t measure the value of social media. You can only measure the value of the business results you achieve by applying social media. This means, to gain value, you must apply social media to a well-defined business purpose.” Mark McDonald and Anthony Bradley.

4.9 Governance implications

The range of issues raised in this report should be on Board agendas, and the following questions should be considered for the oversight of executive management.

- How well does the organisation learn from success and mistakes, and convert learning into business improvement? What helps and hinders its learning ability?
- How collaborative is it? What steps are necessary to achieve or maintain desired levels?
- How technologically-savvy is the organisation? How does that influence future capability and innovation?
- How effective is the leadership team in encouraging technological competence?
- What investments can enhance learning and collaboration?

- Does the organisation have expertise in future-proofing, as far as feasible? Who works on this, and on driving transformation, innovation and the ability to execute strategy?
- What mechanism exists to integrate thinking and exercise good governance of initiatives regarding the digital workplace?

- Does the organisation’s change strategy enhance both learning and employee commitment by being a developmental process?
- How does the learning function perform and compare with others? Is it doing the right things? Can it be improved?
- How knowledgeable is the board about how technologies improve organisation effectiveness and innovation?

US Marine Corps case

- Bradley and MacDonald, in The Social Organization, tell how the US Marine Corps in 2009 temporarily banned the practice of accessing the social Web until it could assess the costs – and benefits – and formulate policies that minimise risk.
- Eight months later, it re-opened access after absorbing the costs of formulating, socialising and enforcing the policy.
- Network usage soared, incurring further costs in investment in bandwidth and further security measures – bearing in mind that Facebook use is assessed as one of the main threats to information security.
- However, the Corps continues to apply social media more strategically to its mission, with a constant eye on tangible costs and benefits.
- Note that another prominent US user of social media both internally and externally is the CIA.
While some board directors are adept in using technology, others are not. However, board processes are becoming e-enabled, so new skills are needed – see the column.

An important development below main board level is the emergence of a digital governance board, pulling together the functions involved in shaping the digital workplace. *Global Digital Workplace Trends 2012* reported that 17% of surveyed organisations now have a fully functioning digital board.

Its purpose is to co-ordinate decision-making for the intranet, collaborative spaces, social tools, external web sites and external social networking platforms – as well as consider the human factors discussed in this report. This board has an on-going role rather than just being a project steering group.

### 4.10 Looking to the future

We asked interviewees about their future plans regarding learning and technology and the important advances they envisaged. Matthew Hanwell, HR Director, Community and Social Media, at Nokia, described a particular challenge.

"Using social media, employees across the world say what they think and we know about it. It allows leadership to understand and address the strength of feeling. We want to move to openness and transparency, encouraging a challenging mindset – the bottom line results will come after."

#### About learning

Corporate L&D interviewees mostly talked about

- embedding 70/20/10 deeper and facilitating informal learning
- improving virtual and mobile forms of learning
- encouraging the use of new communication and collaboration tools more widely and consistently.

Some technology-oriented companies are more ambitious. "I think we will be using more crowd capabilities to move forward innovation at IBM,” said Ian Bird, Leader in Social Learning.

#### Learning and work advances

- Technology will be used in smarter ways to enable experiential learning on-line. As high quality graphics and simulation become less expensive, they can be used more widely.
• Improved video-telephony will become widespread – reducing further the need for travel and physical meetings.

• Social media vendors will stop seeing internal and external-facing channels as separate, and will integrate their offerings.

• Security will continue to be tested by hackers and malicious geeks – everyone will need to be more rigorous about precautions, and learn that keeping up-to-date is important.

• Reliance on the Internet will need to be re-thought. Increasingly, there is little that will work without net enablement and electricity supply. Violent sunspot activity and other climactic phenomena could create serious damage to operating systems everywhere.

• Artificial intelligence and robotics will become more pervasive, throwing up new societal challenges as the need for human labour diminishes.

About technology
All interviewees found it difficult to predict any new developments, such as those from the explosion of mobile and social media – including those in technology businesses. The future is felt to be unpredictable. However, see the column for some possibilities.

We make three concluding observations.

• All leaders will be challenged if people, generally, continue to increase their interconnectivity, and reduce their reliance on controlling forces – whether commercial or political. At the same time, ever-smarter tracking by authorities will become a major societal issue.

• Technology will continue to surprise organisations, given the accelerating pace of invention and development.

• Organisations can become better at learning how to ‘make things happen’, by being more skilled and prepared in project management, and using social media to improve design and speed when applying new technologies.

The lesson is to be more alert than ever in anticipating or adapting to developments, and to think more deeply about the implications for people inside and outside the organisation.

"Social media and all things Web 2.0 are technologies, and technologies come and go. What endures are the new ways of working that people perfect using these technologies," said Mark McDonald and Anthony Bradley.

Effects of social media

Moving to ‘warp speed’
• Social media enables organisations to accelerate business improvement dramatically, replacing traditional methods that could take months of finding and delivering solutions.

• By enabling front-line peer learning, such improvement embeds in work processes, producing faster and less disruptive change. Rapid risk assessment and expert input becomes part of a collaborative real-time process. The role of L&D and leaders is that of change enablers.

The end of e-mail
• A press sensation ensued in 2011 when Thierry Breton, CEO of Atos Origin, announced a partial ban of e-mail.

• Short messaging features in social media programmes are being used instead – with e-mail becoming a back-up or for communicating externally.

• Capgemini says its e-mail traffic has reduced by 40% in 18 months since adopting Yammer. Communication has become faster, cheaper and more effective – including learning and shared problem-solving benefits.

• Gartner predicts social networking services will replace e-mail by 2014 as the main method of inter-personal communications for 20% of business users.
Forecasts of technology shifts

- 4G will shortly become widespread – and attempts to enable ever-increasing breadth of connectivity will continue.
- Convergence will move towards smaller and more powerful, multi-functional mobile devices.
- Advances in chip technology will aid this – and more devices will become computer-aided and ‘intelligent’, and controllable by mobiles.
- Tablets and laptops/netbooks will become one type of device by 2014 becoming omnipresent work tools, using apps that cannot yet be imagined.
- While Blackberries will disappear, other phones will acquire more user-friendly keyboards.
- Mobile Internet usage will overtake PC-based usage before 2016, a report by IDC predicts.
- Electronic publishing and corporate learning will become dominated by multi-media offerings – reading material that connects easily to sophisticated visuals and additional information sources at a stroke, for example.

4.11 Recommendations

Learning practices

- Integrated with business improvement, innovation processes, knowledge-building and collaboration.
- Intrinsic to external and internal customer service, using the 70/20/10 concept to guide collective learning.
- Select and support managers to be learning leaders and performance coaches.
- Deploy communication and social media to build performance support and capability.
- Recognise learning achievement and the organisation’s champions of good practice.
- Identify internal sources of expertise among individuals and networks, and support these with content developers.

Business transformation units

If asked which department works with the top team to drive improvement and ensure future-readiness, the answer is often unclear, negative or, possibly, the strategy unit.

- Some organisations have created a high-level, multi-skilled team that is both strategic and practical in focus, whose role is to drive improvement and facilitate change.
- Elsewhere, it tends to fall between several stools, or is done in piecemeal fashion.
- This is exacerbated if head office functions do not work in an integrated way – or do not collaborate across the organisation.

IBM cites the creation, some ten years ago, of a business transformation unit reporting to its CEO, as being fundamental to its shift towards becoming a ‘social organisation’, focusing on collaboration.

HR/L&D should see that such a unit has OD skills and is technology-savvy. This helps ensure that strategy and change are implemented effectively – and also should help HR/L&D to play its part in change management, business improvement, and capability development.

See CRF’s report, Configuring HR for Tomorrow’s Challenges, Chapter 9.6, for recommendations regarding such a unit.
Digital working

- Explicit strategy, to
  - exploit technology for teamwork, productivity and performance outcomes
  - reduce costs
  - rapidly accelerate business improvement and innovation
  - gain and sustain competitive advantage.
- Building the organisation’s digital competence, including shared communication disciplines, to manage risk and improve enterprise value.
- More integration between communication, learning, collaboration, knowledge management, research, performance improvement and innovation.
- Using business transformation units to anticipate technology advances and build these into strategy.

Leadership

- Ensure board oversight of strategy and executive performance is technology-savvy – knowing the right questions to ask, and how to get insightful data.
- Executive leaders become role models in communication, knowledge-sharing, the practice of learning and collaborative behaviour – with accountability for developing the trust that sustains a high performance culture.

What new L&D looks like

- L&D strategy – embedded in organisation strategy.
- L&D purpose – to improve organisation performance and capability.
- L&D effectiveness – measured by contribution to business results and value by improving capability and performance.
- L&D leadership – ‘human systems’ and learning architect, shaping leadership and culture.
- L&D skills and roles:
  - OD-led analysis and solution development
  - enabling collaboration and collective learning
  - savvy about technology, process and work improvement, project management and innovation
  - change agents
  - expert learning designers and buyers
  - skilled content developers
  - partners to internal experts.
- L&D accountabilities:
  - developing ‘learning leaders’
  - learning solutions for business problems
  - improving performance with individuals, teams and the organisation
  - facilitating the building of collective knowledge and capability
  - developing managerial and specialist talent
  - growing internal coaching capacity
  - improving the learning component of the employer brand.
# CASE STUDIES

## Topics covered

<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.1</td>
<td>Overview</td>
<td>47</td>
</tr>
<tr>
<td>5.2</td>
<td>Dyson</td>
<td>47</td>
</tr>
<tr>
<td>5.3</td>
<td>Ericsson</td>
<td>49</td>
</tr>
<tr>
<td>5.4</td>
<td>Deloitte</td>
<td>51</td>
</tr>
<tr>
<td>5.5</td>
<td>IBM</td>
<td>54</td>
</tr>
</tbody>
</table>

## Introduction

In this chapter, we provide contrasting aspects of how communications technologies are changing work and learning in four organisations.
“The first priority is to get the right people in the room.” Cathy Doyle-Heffernan, Dyson.

5.1 Overview

Interviews in 20 companies were the basis of our research, typically with the head of learning, either for the company or in the UK/EMEA office. In some cases, we spoke to the HR leader and corporate IT heads.

Additionally, learning experts and some technology suppliers, who furnished further company examples, were interviewed. Other examples came from extensive desk research of contemporary sources.

We accumulated insights from nearly 30 organisations, most of which were large, global employers, with some medium-sized companies to provide a more balanced view. We believe this report is an accurate assessment of the state of play across large-to-medium organisations.

It is, for most, a picture of ‘early days’ and ‘work-in-progress’. Few can be said to be sophisticated in deploying new technology tools for learning and collaboration – and even those explain that developments are fast-moving and ongoing.

We feature four contrasting companies as brief case studies, all of which are international though differing in size. Each has knowledge workers – who represent a significant part of their value.

5.2 Dyson

Dyson Ltd is an engineering design company founded in 1992, known for its innovative vacuum cleaners and fans. Its headquarters and R&D centre are in Wiltshire, UK with its manufacturing and assembly now done in Malaysia. It sells in over 50 countries, and employs over 3,500 people worldwide. Its most recently listed turnover was £1bn.

Business and learning strategy

A new CEO, German-born Max Conze – formerly at Proctor & Gamble and previously Dyson’s North American President – is leading the company through a process of globalisation, aided by newly-recruited Group HR Director, Cathy Doyle-Heffernan. Until recently, she led HR globally for Thomson Reuters’ Legal business.

Two core strands of this process are developing talent globally and creating a new culture of working. Change is seen to be necessary in these areas:

- more virtual and remote working
- internationalised communication
- shifts in management style.
"I can now talk to, and share documents with, a community of 65 HR people around the world in a virtual meeting from any location." **Cathy Doyle-Heffernan, Dyson.**

Learning is clearly a vital lever in effecting change, as there are ingrained habits to be overcome and new approaches to be absorbed. In addition, adjusting Dyson’s technology infrastructure is an important consideration.

**Constraints**

These are some of the challenges identified at the outset of the change process.

- Moving away from the prevailing UK-centric mode represents a significant cultural shift. Many policies and behaviours need re-casting, including embracing greater diversity.
- Another constraint is security. With good reason, Dyson is protective of its intellectual property, which is reflected in tight physical and IT security. This can conflict significantly with shifting to more remote and collaborative working.
- Dyson is still mainly desk-oriented in its telephony. Adoption and use of smart mobile devices is very limited – some individuals have their own Apple or Android phones and tablets.
- Many managers are not knowledgeable about technology, and the emphasis is on controlling communication.
- While the company has good video-conference facilities in select meeting areas, the combination of a security-orientation and open-plan offices inhibits wider use of video communication. Investment in these facilities is limited to the largest rooms.
- Bandwidth needs expansion to support more powerful and wider-used software for communication and collaboration.

**Starting out the right way**

The CEO asked Cathy Doyle-Heffernan to design the change project. "The first priority is to get the right people in the room," she advised. "That includes HR, IT and Communications. Of course, it is also essential to build in business users’ perspectives – while at the same time being clear that shifts in leadership style will be needed."

IT has been very supportive, and there are already useful projects underway that can integrate with the change project.

- Microsoft Lync had been piloted, offering a single platform for voice, Internet messaging, video and web-conferencing. One aim had been to enhance collaboration across global functions such as HR, Finance and Marketing, and to increase virtual meetings for key projects or global broadcasts to a now-global senior leadership team.
- Two major technology projects are underway, including customer relationship management (CRM) technology, which inter alia will enable customer-facing employees to collaborate better. Additionally, R&D project management software is being implemented which has collaboration capability.

**Building on previous experience**

Cathy Doyle-Heffernan recently left Thomson Reuters where she had various global HR roles. She undertook a similar globalisation project within the Legal business unit, which had been very US-centric prior to the Thomson and Reuters merger.

This started with basic training in how to use international telephony and understanding foreign accents. Then came the creation of virtual teams, developing virtual leadership capability, and moving to more integrated ways of working.
"It helps that Ericsson already has a culture of learning, and of sharing. It’s part of our Swedish heritage.” Peter Sheppard, Ericsson.

Ericsson at a glance

- 55% of Ericsson’s sales relate to fixed and mobile networks. More than 40% of the world’s mobile traffic passes through them.
- 50,000 employees are in services — generating 40% of sales — including 20,000 as part of outsourced service contracts. Its Global Services Centers are in China, India, Mexico and Romania.
- ‘Multimedia’ means software-based solutions for real-time and on-demand television, consumer and business applications, and business support systems for telecom operators. These support messaging, social networking, advertising, Internet commerce and enterprise systems.

Use of Sharepoint is also being piloted. “The pilot started with the Legal function which is geographically dispersed and works on shared documents regularly. Although we’ve run into some issues, it’s the best place to start to thrash these out,” she explained.

“Tools like Lync clearly enhance the management of international teams. I can now talk to, and share documents with, a community of 65 HR people around the world in a virtual meeting from any location.”

Looking to the future

Doyle-Heffernan envisages a two-to-three year timeframe to embed globalisation and the related communication technologies. She expects her HR business partners to be change agents. “We have a small L&D team, but BPs should be OD-conversant – and that means being able to guide better learning, communication and collaboration.”

"It’s different behaviour that will need nurturing. That includes simple things such as appreciating the reality of working in different time-zones. Historically, our emphasis has been on single country, in-office working which can fit into a defined workday. We are now challenged with thinking through how to incorporate flexibility in our ways of working."

The programme also provides an opportunity to develop change practices.

5.3 Ericsson

Ericsson is a top ten IT services provider with three business areas – networks, services and multimedia. Its vision is to be ‘a prime driver in an all-communicating world’, enabling networking in order ‘to empower people, business and society’, and using the slogan ‘technology for good’.

Headquartered in Sweden, and founded in 1876, it has now over 100,000 employees worldwide, nearly 20% of whom are in R&D.

Business and learning strategy

With its aim of ‘making the Networked Society a reality’, Ericsson has the challenge of ensuring that it achieves this desired state internally.

Hence, a core learning goal is to grow the workforce’s competence in technology, with full use being made of social media and web applications.

An ancillary objective is to build capability in Internet technology (IP) rather than just telecoms. Ericsson’s multi-media business is expected to grow substantially – for example, it is anticipated that within five years video will represent 90% of network traffic. It is similarly preparing for acceleration in ‘M-commerce’ – that is, payments from mobile devices.
“We have the tools that help us become a stronger community and, for the immediate future, it’s about using these well.”  

Peter Sheppard, Ericsson.

Ericsson has devised ‘competence shift programmes’, with targets and critical paths, to ensure it is ready to serve customers when releasing new products and technologies. These derive straight from the business plan, and progress is monitored through the Balanced Business Scorecard. In doing this, the company is also seeking to learn faster and work more globally than ever before.

**Learning support structures**

There are three main participants facilitating learning.

- Group learning functions.
- Regional heads of learning.
- Technical academies.

Peter Sheppard, Regional Head of Learning and Competence for Western and Central Europe, explains: "We use the word ‘academy’ to brand everything we do in learning. There used to be an Ericsson University, with a defined structure. Now it’s more virtual and social."

There is a range of academies supporting different areas of capability, such as sourcing, leadership and various technical areas. Each has a head of competence-readiness, whose remit includes creating web-learning resources.

“A challenge for heads of competence readiness is not the e-module software, but how to achieve control over content quality. We have lots of stuff lurking in our LMS, but it’s not all joined-up.”

**Informal learning, social media, collaboration**

While there is still much instructor-led learning and face-to-face training, Ericsson is steadily increasing the proportion of self-help through boosting on-demand e-learning and social media – as well as emphasising the importance of on-the-job learning. "In following the 70/20/10 principle, we are working on the 20, and towards the 70," commented Sheppard. He mentioned that the post of Head of Everyday Learning has been created in Sweden.

“It helps that Ericsson already has a culture of learning, and of sharing. It’s part of our Swedish heritage. We are a networked organisation and consensus-oriented. There’s an inherent belief in the right to question, and ensuring everyone has their say.

“The advent of social media, therefore, suits us very well. It can be frustrating for certain nationalities, because when we say ‘get on with it’, it means the start of a discussion – not necessarily taking a decision! However, social media helps speed up the process.”

Similarly, knowledge-sharing and collaboration have always been culturally legitimate, and Ericsson has been investing in tools to facilitate these, such as Microsoft Sharepoint 2.0.

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**My Net**

Patrick MacDonald, who heads internal communications for L&D across various geographies, observed that, “This new social media tool takes us to warp speed compared to our old collaboration site.

“You can get rapid answers from around the world. It makes the world a smaller place, with 100,000 people at your fingertips. It also saves on travel costs!”

**Tools for knowledge-sharing and collaboration**

- The intranet is collaboration oriented, and has moved from being passive to interactive.
- Team collaboration sites have become key channels for sharing and communicating. Usage data also provide excellent, up-to-date insights into learning activity.
- Academies operate on a networked basis.
- Instant messaging is to the fore, with e-mail increasingly just a back-up.
- Cross-regional team working has been enhanced through investments in video-telephony and tele-presence – including buying a company specialising in this.
We encourage people to contribute to the firm’s strategy, so naturally we are concerned to have good communication channels that enable improvement and the flow of ideas. **Neil Imber, Deloitte.**

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**Both federal and integrated?**

- Deloitte’s federated structure serves to limit legal liability, as is common in large, global legal and accountancy firms.
- Each member firm provides services in a particular geographic area.
- Collaboration across its federated structure is now a priority, to serve clients who more than ever must operate in a global context.
- This means building consistent global capability, with shared methods, knowledge and standards – and also to share a culture.
- Innovation is another espoused strategic priority, reflected in the firm’s sponsorship of the Deloitte Institute of Innovation and Entrepreneurship at London Business School.
- There is a central group L&D function, which inter alia provides the Learning Management System used worldwide and manages investment in shared content from a variety of vendors.

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**Leaders have been provided with tools to enable virtual leadership, but what counts, of course, is the way they use them. Meanwhile, Ericsson uses an on-line coaching contractor to support a wide range of line managers, especially in sales. This includes use of a virtual classroom and break-outs.**

The company believes it is in control of security – as it is essential to get this right for customers too.

**Looking to the future**

Sheppard feels the right course has been set, but envisages ‘more and further’.

- Greater and more effective use of My Net.
- More focus on knowledge trapping and sharing.
- Ensuring the right methods are deployed to develop capability.
- More rapid and effective tailoring of learning solutions and content.
- Targeted use of coaching.
- Strengthening the links between business projects and learning.

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**5.4 Deloitte**

Deloitte Touche Tohmatsu Limited (DTTL) is a group of 47 partnerships, spanning 150 countries, and sharing a common brand name. Services include audit, consulting, financial, tax and risk management advice. Worldwide, these firms employ some 182,000 people, are continuing to grow and, in combined revenues, currently rank as the second largest firm of its kind.

The company originated in London in 1845, and this is currently its legal home, although the global operational headquarters is in New York. The UK firm, which also operates in Switzerland, employs nearly 13,000 people.

**Business and learning strategy**

Deloitte has the continuing challenge of differentiating itself from close rivals KPMG, PwC and Ernst & Young, both with customers and the talent market. Its vision is to be ‘Always One Step Ahead’ and to set the standard for excellence. Neil Imber, Head of Learning for the UK firm, says this creates a healthy pressure to be “the distinctive firm”, in areas such as quality, innovation and the talent it hires and develops. This intrinsically links its L&D strategy to business objectives.
"We have to be more innovative and stretching, using simulations and coaching, as well as distance methods. The blend must be more varied."  

Neil Imber, Deloitte

The company has continued to invest heavily in talent during the recession, and has put particular emphasis on client-serving skills. There is extensive use of coaching and mentoring to address relationship skills, embed and accelerate high performance, and to reinforce this culture.

Culture development has been a core element of L&D for some time. “Everyone is reminded through multiple communication channels that they are an ambassador for Deloitte,” explains Imber.

Shifts in learning practices

Better use of technology is playing an increasingly important part in the way Deloitte has implemented its learning strategy over the last two years, to meet user and corporate needs.

- Asynchronous learning: people now travel more, which is driving the use of mobile devices – a large majority of the firm now have a work smartphone.
- Foundation learning: the large graduate intake – over 1,200 in 2012 – are now brought up on the Internet, distance learning and social media.
- Self-driven learning: beyond the essential knowledge-building required for compliance purposes, ambitious and motivated people are best able to advance at their own pace and in their own time. ‘Pull’ is more attractive than ‘push’, as it can be more speedy, flexible and cost-effective.

L&D preoccupations

Accordingly, these are some of the L&D function’s pre-occupations.

- Adapting learning content for delivery via mobile devices.
- Making e-learning, especially compliance content, more engaging.
- Increasing the use of virtual classroom and coaching provision.

“Use of classroom learning still has a part to play. But we have a significant number of people in their 20s now. We have to be more innovative and stretching, using simulations and coaching as well as distance methods. The blend must be more varied,” said Imber.

Learning technology manager, Andrew Smail, points out that this has happened fastest in the US. “Given the distances, virtual classrooms make sense there, but we are now encouraging a similar approach elsewhere, and that on-line is the default. It offers flexibility and agility, and our job is to ensure that quality is as high or higher.”

There is an extensive “industry learning” curriculum, linked to communities of practice (COPS). “We are told that we are quite distinctive here,” observed Imber, “and COPS are ingrained in our business model. These look beyond core service areas such as audit and tax, and cover the various markets we serve, such as telecoms, finance, hotels and leisure.”

Internal versus external content

- Some learning content is sourced externally, mainly through relationships with trusted suppliers. External coaches are used for senior staff – partners and directors.
- But in general, there is an increasing focus on, and debate about, using internal resources, starting with learning professionals – some 65 in the UK practice.
- Client teams are encouraged to develop content, especially where this is of value to clients.
- One business team has started to design Android apps.

Learning resources

A rich blend of resources is evolving, linked to COPS, including

- on-line knowledge banks
- e-learning
- discussion forums
- masterclasses.

This system is increasingly running on a regional EMEA and global basis, so better serving global clients and industries.
"It comes down to trust – our course on social media will propagate principles, not rules, about using the likes of Facebook and Twitter." *Andrew Smail, Deloitte.*

**Social media and communication**

Social media is of growing importance in Deloitte, going hand-in-hand with a recognition that learning, internal communication, business improvement and innovation are fellow travellers.

"It helps that our people understand this – we have consultants who think about this for their day job," noted Imber. "What’s more, we encourage them to contribute to the firm’s strategy, so naturally we need good communication channels that enable business improvement and the flow of ideas."

- In early 2011, a social network was initiated in the UK firm using Yammer. By the year-end, half the company had started using it. High adoption by industry groups has helped, and it is being built into training programmes in terms of pre- and post communication.
- Yammer also complements pre-existing e-rooms and knowledge centres, speeding its development as an all-round communication and work tool.
- iCafé brainstorming events are run to capture employee ideas on specific client issues, and there are iWeek campaigns dedicated to collecting ideas on challenges that clients face.
- iSpace has been created as a virtual place to submit ideas. Winning suggestions are adopted. On-line and off-line contributions can be made through Yammer.
- iZone is a new client-facing innovation facilitation space in Deloitte’s London office, enabling staff to work with clients in a collaborative way to solve complex problems. The UK CEO, David Sproul, hosts meetings there.
- Deloitte TV has been created to communicate with all stakeholders, and as a platform for Deloitte Global Forum, featuring prominent figures and Deloitte people worldwide. Anecdotally, there appears to be considerable internal take-up. Access to Facebook is allowed. However, Deloitte ensures a high level of security with regular testing. In addition, a social media training course is being developed. "It comes down to trust – the course will propagate principles, not rules, about using the likes of Facebook and Twitter."

**Working together**

The development of social media and new learning channels is greatly enhanced by the way key functions collaborate. L&D works closely with – among others – Internal Communications, the Innovation and Brand team, the Performance Management Group, the Diversity and Respect team, and with HR colleagues in general. "We are all working towards a common end," said Andrew Smail.
“We have recognised the importance of the social dynamic creeping into business, especially in the last two years.” Ian Bird, IBM.

**Measurement and evaluation**

In common with other companies, more on-line learning enables usage to be tracked. “Regulators like this,” observed Imber, but added: “Quantity is less important than quality. We need to ensure we have good on-line content, not more.”

While not easy to assess, Imber notes, “We receive great returns in the staff survey.” He explains that Deloitte’s leadership do not seek specific ROI data. While sound business cases are required for significant investment, they are happy with anecdotal data and stories from staff as evidence of the quality of development — and of the impact on them and their part of the business. “They also trust us … we’ve earned respect over the years for our judgement.”

Imber also notes that the least value is obtained from generic, off-the-shelf materials, which has encouraged internal sourcing. “It’s worth investing in good production, but not for everything. Much learning is viral and peer-driven.”

**Looking to the future**

For the foreseeable future, Imber feels it’s a matter of bedding in the significant shifts initiated in the last 18 months. “In five years’ time, we will still have classroom learning, but will have enriched our on-line content. We need to keep working at on-the-job support, especially providing great assignments.” Coaching and mentoring will remain an important lever.

He also envisages Deloitte continuing to strengthen the internal development of learning content to underline the firm’s distinctiveness.

**Practising at home**

- Since collaborative systems are now such an important sales item, IBM has accelerated the involvement of its employees in product testing, known as the Technology Adoption Program.
- During 2011, the number of people engaged in trialling ‘beta’ products increased from 12,000 to 73,000, relating to some 80 projects.
- This is a result of the closer working partnership between HR (Talent and Learning), internal IT and IBM’s software development group.
- It also represents a fusing of individual and organisational learning, directly linked to business performance.

**5.5 IBM**

IBM, which celebrates its centennial in 2012, has revenues of $100 billion derived from IT services and business consulting. It employs over 425,000 people in 170 countries, of which over 75% are now outside its traditional US homeland.

**Business and learning strategy**

IBM has been developing and selling software to support group working since the 1990s. A significant change in philosophy and, therefore, strategy, has emerged more recently.

“Until four years ago, we had a traditional top-down, data-driven approach to knowledge and information dissemination, and were very protective of the intellectual capital on which we trade,” explained Ian Bird, the Global Social Learning Leader at IBM. “However, we have recognised the importance of the social dynamic creeping into business, especially in the last two years. We then started looking seriously at how we can harness this to accelerate skill development and productivity.”
An important consideration is the growth of the company, including over 100 acquisitions in ten years. Many employees are relatively new to IBM, and come from many cultures. Therefore, it is vital to strengthen ways to bind people to IBM’s culture, brand and quality standards. Also, structure and working methods need to be constantly adjusted, while ensuring that all employees are working together to meet the needs of clients.

This has led to the traditional model being turned on its head.

- People are empowered to contribute knowledge, and thus enrich IBM’s intellectual capital.
- They are expected to collaborate and work with peers.
- Over 30% are now working remotely.

"Our work support systems and learning approach have to suit this community. Moreover, internally we are the test-bed for the products and services we sell to support collaborative working."

Thus, becoming known as the ‘social business’ has become critical for IBM’s brand, both externally and internally. This means merging areas such as learning, knowledge management, collaboration and innovation into an integrated business approach, enabled by technologies.

As regards software, Lotus Connections is currently the key tool in facilitating learning and connectivity.

Learning and collaboration

- Like many companies, IBM is working on embedding 70/20/10 more deeply. At one point, the pendulum swung too far towards promoting distance learning. “As a result of internal feedback, we took stock and have now achieved a better balance with face-to-face.”
- The company uses a lot of blending – hybrid events that build face-to-face and facilitation into distance learning and communications, including live video, and also emulating the classroom while still being virtual.
- In addition, there are many communities of practice – including one on how to manage communities. The role of ‘community manager’ is recognised as increasingly important.
- IBM captures knowledge from retiring workers using a wiki-based tool called ‘Pass it Along’, which generates tutorials for other colleagues.

In particular, there is a Center for Advanced Learning – a team of around 100, working virtually, which acts as thought leaders in various subjects. They partner with IBM Research, and provide insights to design teams working in the business. For example, one in Washington is examining the potential of gaming in order to improve learning outcomes.

Digital competence

Ian Bird added that, “Everyone in IBM is expected to collaborate and share, and it helps build your profile. Particularly in consultancy, you should develop your digital reputation, and contribute to thought leadership. OK, we know that not everyone will contribute, but we are actively encouraging it.” IBM taps the enthusiasm of the best contributors, recognising them as champions of key processes.
Craig Yetter, Director of Global Learning at GlaxoSmithKline, was previously at IBM and admires the way you are expected to be ‘the keeper of your competences’. “It’s all part of your personal development. You are recognised for what you know. There are connections to communities, and a whole system process behind it. It works.”

IBM’s guidelines for staff on using social media are publically available. These were initiated in 2005 by staff engaged in blogging, developed through a wiki, and have since been updated and extended to cater for all forms of social computing, again through a participatory process. They cover both internal and external communication.

Measurement and evaluation
Ian Bird explained that, as a starting point, IBM uses Kirkpatrick Levels Three and Four to evaluate learning outcomes.

The use of many e-applications makes some analytics really easy. However, social media are trickier. “To date, we’ve been doing it because it feels right; it makes sense to be working better. We’re starting to pick up some useful ways of collecting data, by looking at perceived value, consumption and more.” The following are some of the dimensions IBM measures.

- Connectivity data – usage.
- Ratings of relevance, ease of use.
- Assessing networks with advanced analytics.
- Level of thought leadership.

Another dimension to learning assessment is to identify good content, and force out that which is poor or unused – especially as more is sourced via the extended IBM community.

“Managers play an important part – if they have useful dashboards, they are more likely to participate in data collection and be better users.”

Looking to the future
IBM will continue its drive to become a ‘social business’. This will involve

- more ‘crowd-based’ learning and innovation
- expanding the blend of approaches
- boosting the social element in all learning programmes
- becoming more ‘mobile’
- greater recognition of contribution and sharing.

This continuing transformation will also require becoming adept in change management, which in turn will be reflected in learning processes.

Transformation office

A critical factor in developing IBM’s orientation to collaboration and learning was the creation of a transformation office some ten years ago, reporting directly to the CEO.

This has facilitated change in the organisation’s people, culture, processes and technology in an integrated way.

Blue IQ
IBM initiated the Blue IQ programme in January 2010. This was intended to accelerate the new focus on

- social working
- development of skills
- sharing of learning
- increased collaboration
- more productive ways of working
- and thus, business improvement.

The programme built on the achievements of early adopters – and champions such as Luis Suarez, well known in the blogosphere for fostering ways to avoid e-mail overload. The aim is to drive social media adoption so that all employees participate and benefit.

BlueIQ at IBM
**Books**


**CRF reports**


**Other reports and articles**


