



COVID-19

Explorance Quick Pulse: L&D Market Impact Survey Insights Report

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Background & Objectives

- **Inspired by suggestions from some of MTMImpact community members (MTM-using professionals working in the L&D domain), Explorance conducted the COVID-19 L&D Market Impact Survey in April 2020**
- **The survey measured perceptions of MTMImpact community members during the COVID-19 pandemic**
- **The specific objectives of this survey were to:**
 - Measure perceptions on the impact of COVID-19 on various areas including roles and responsibilities, priorities, challenges, technology uses, and help needed from institutions
 - Develop a rich perspective that can be beneficial in helping our MTMImpact community members manage the impact of COVID-19 on L&D

Methodology

- The survey was available to be taken online from April 7 through April 24, 2020
- MTMImpact Community members (MTM-using institutions) were invited to participate in the survey through private email invitations (using BlueX)
- [Total 24 questions](#) were asked
- We received responses from 42 companies
- More information about the analysis used in this webinar can be found in [Appendix A](#)

Executive summary

COVID-19 is impacting responsibilities today, but is perceived to have lower impact downstream

- Most HR respondents say that COVID-19 has impacted job responsibilities.
- However, less than half of HR employees and 1/3 of L&D practitioners see a future impact.
- Supervisors (vs Individual contributors and Senior leaders) are feeling most of the heat today but senior leaders are most likely report a future impact.

What employees need from their leaders

- Transparent communications
- Decisions and strategic direction

The top priority for all organizations:

- Moving their curriculum to virtual quickly
- But they are challenged with replicating hands-on activities in a virtual environment and translating face-to-face training to virtual



Nearly all employees report they have the technology needed for remote work.

- But employees have identified technologies that they didn't need pre-COVID-19 but need now
- The top three tools that are most critical now have a 'back-to-basics' theme": video conferencing for remote work, an LMS to provide content, and collaborative tools to enable remote work

For feedback gathering and reporting, most indicate they have the tools they need to monitor and manage their L&D operations

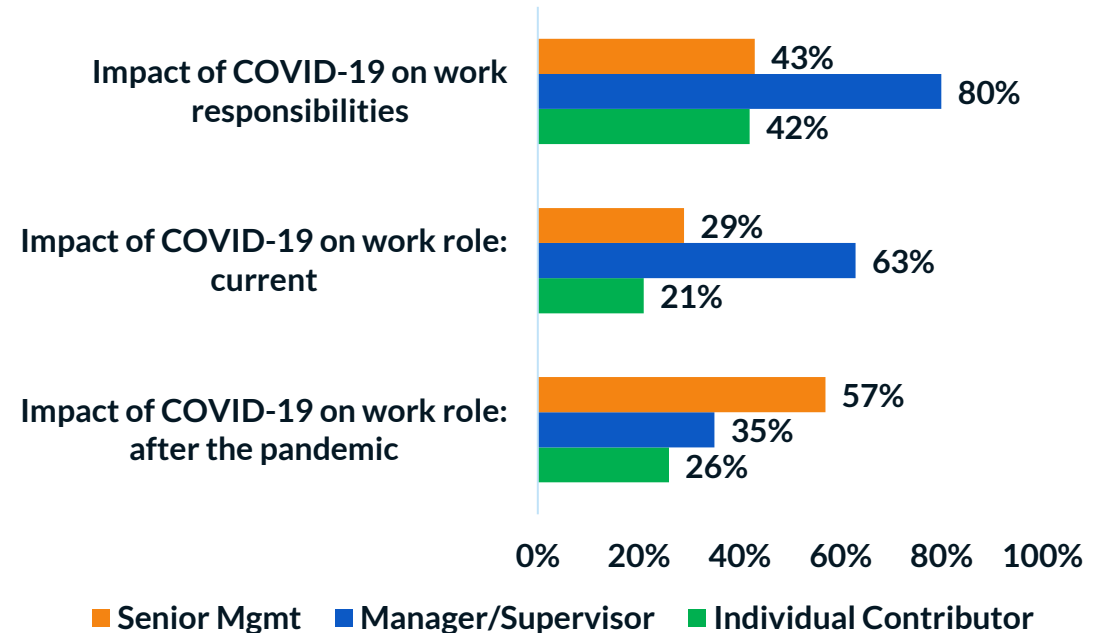
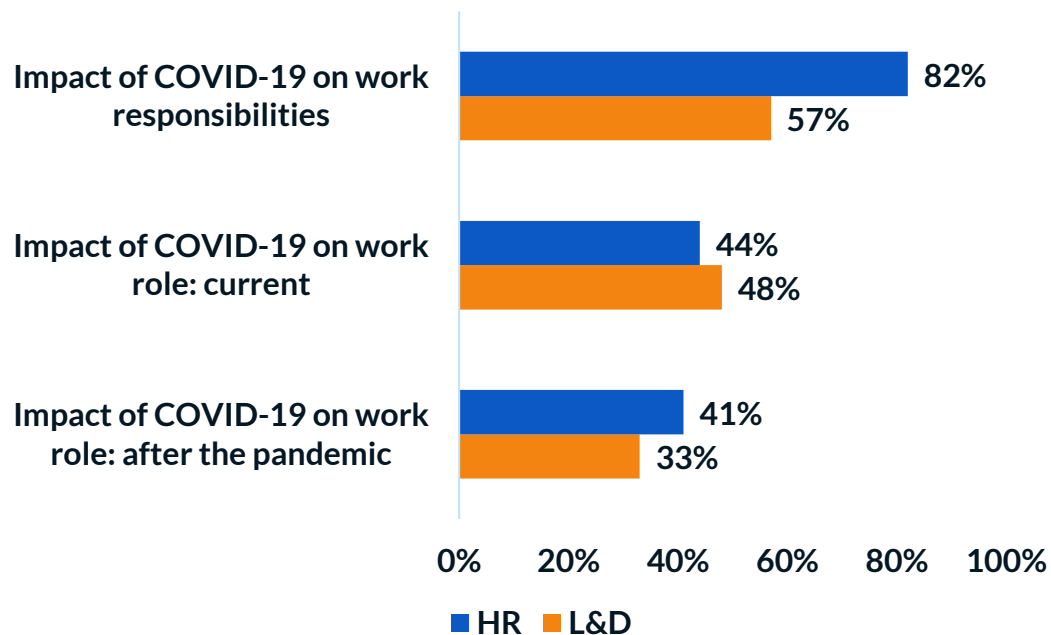
- However, more than half indicate that their reporting requirements have changed
- Interestingly, those who acknowledge new reporting requirements also are 1.5-2.0X more likely to be reinforcing learning, acting on feedback, identifying barriers to application and implementing listening strategies to get real time feedback.

HR + middle managers feel the impact today



- A large proportion of HR practitioners report that COVID-19 is impacting work responsibilities
- Fewer than half of professionals in HR and L&D reported changes in current and future work roles
- Fewer L&D than HR professionals feel that COVID-19 will impact their future work

- Middle level managers feel the most impact on their responsibilities and current work role, while individual contributors are least impacted
- However, a majority of senior leaders see an impact on their future role



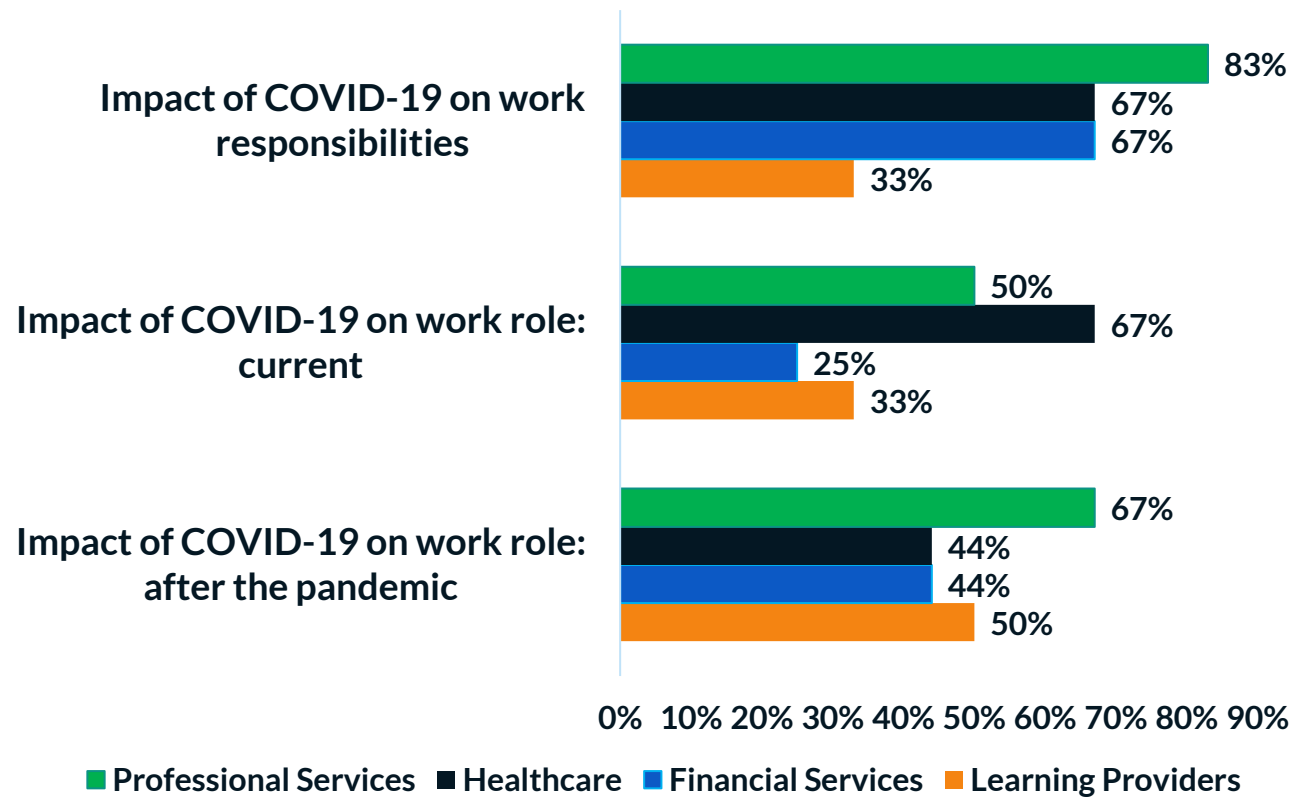


Poll: What is your reaction to these initial findings?

- I'm not at all surprised, it's what I expected
- I'm somewhat surprised
- I'm very surprised



Impact by Select Industries



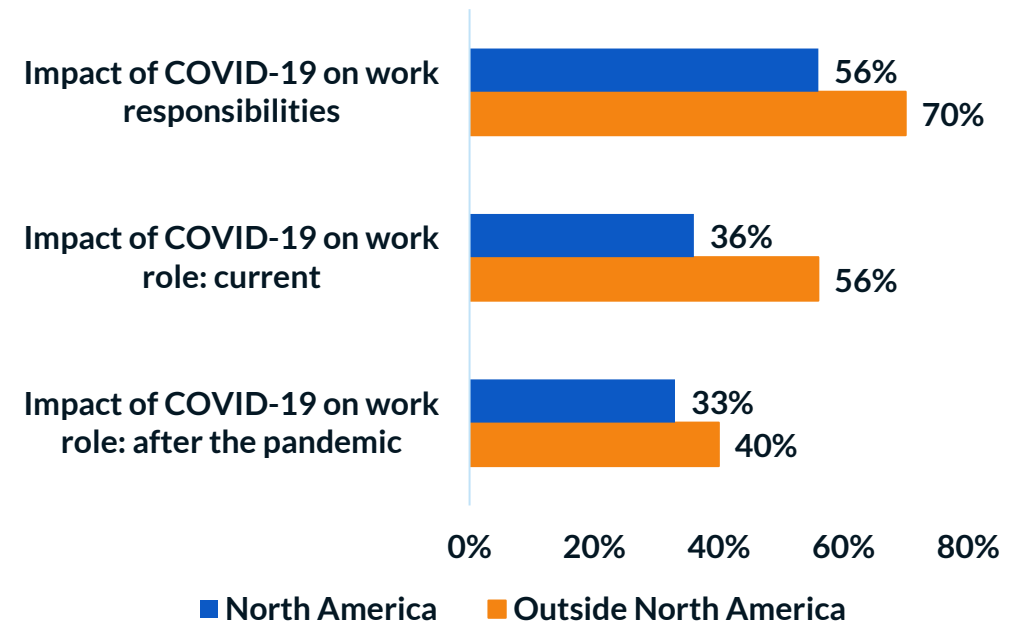
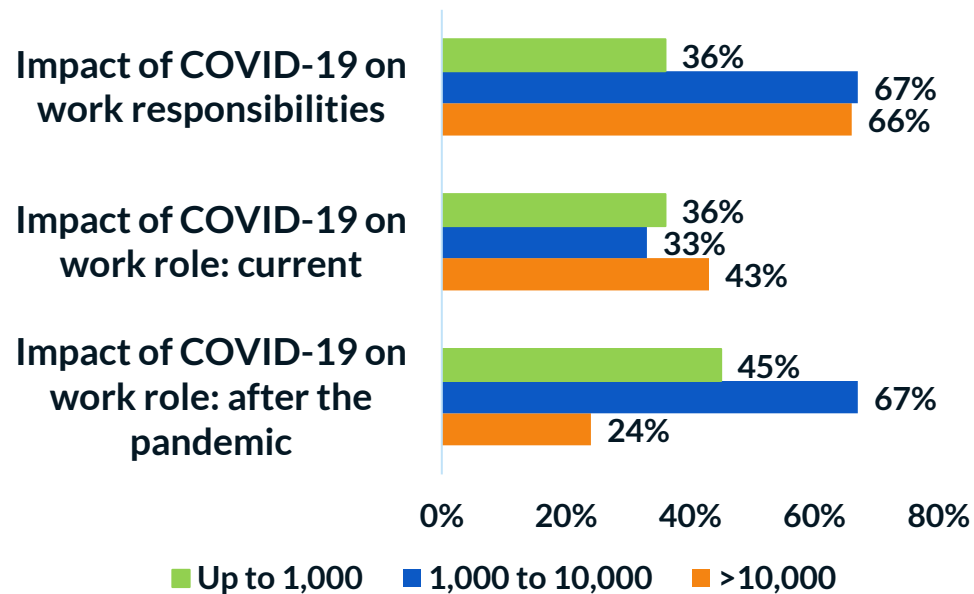
- Professional Services firms feel the most disruption to their work responsibilities today and their roles in the future
- A high percentage of employees associated with Healthcare companies feel the impact on their current work responsibilities and roles, but a smaller percentage report that the changes will persist
- Learning providers appear to be less impacted during the pandemic but report expanded role after the pandemic

Impact by Firm Size and by Region

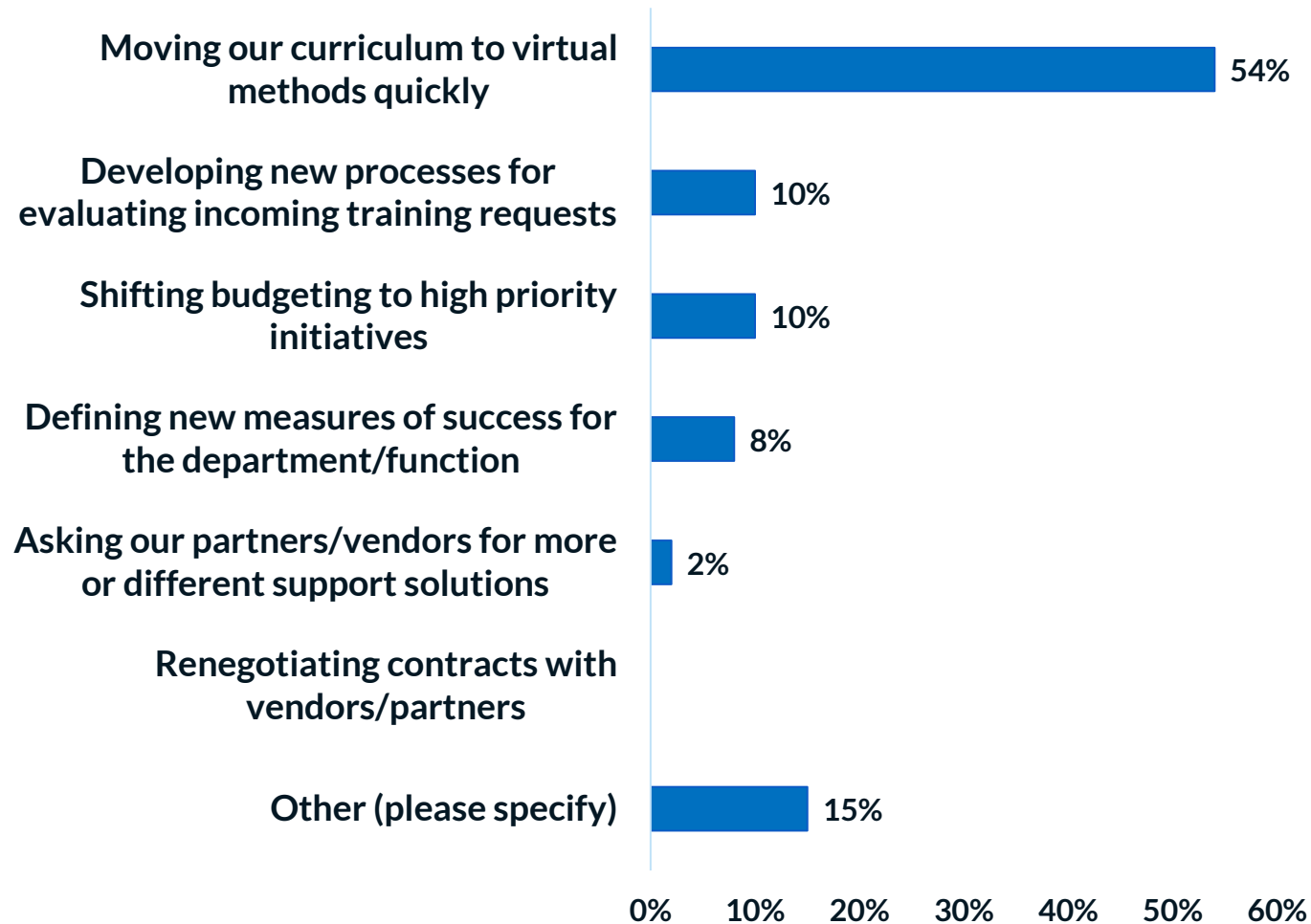


- Few employees of small firms see a major impact on their work responsibilities compared to the employees of mid-sized and large firms
- In the future, over 2/3 of employees in mid-sized firms believe that COVID-19 will impact their future work role

- Companies outside North America appear to be more impacted
- The regional differences may be due to timing and when Europe was affected by the pandemic vs N. America



Moving to virtual is the top priority within these organization



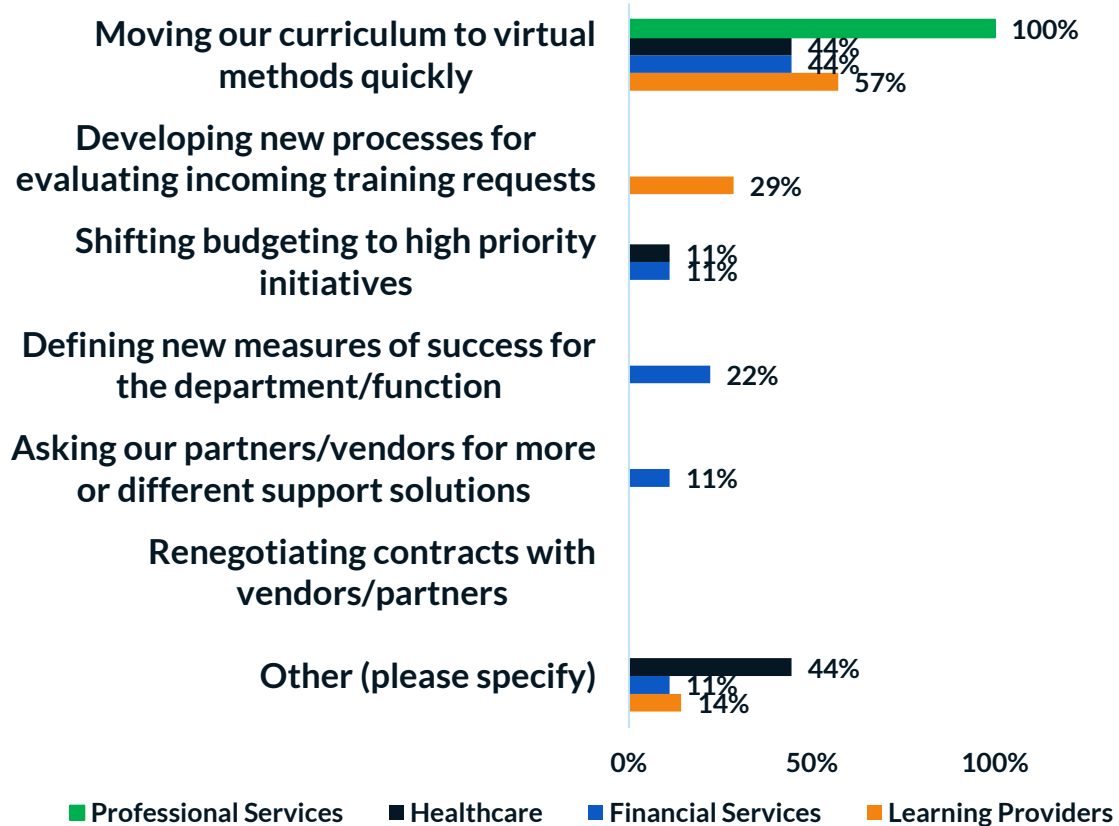
Top priorities specified in “Other”

- Assessment of vital needs training and shifting to reduced or no-contact training where possible, minimizing contact where virtual isn't an option, and alleviating stress on the business
- Ensuring that government policy can be carried out
- Soliciting employees for feedback on how environmental changes are affecting how they work and what their preferences are in this new environment
- Moving both curriculum and capabilities to virtual platforms
- Patient safety and associate safety + Supporting our associates financially, emotionally, physically, spiritually
- We are in healthcare, so our work has purely been helping our caregivers adapt and have the tools and resources they need. We have not made significant changes to our training or measurement approach

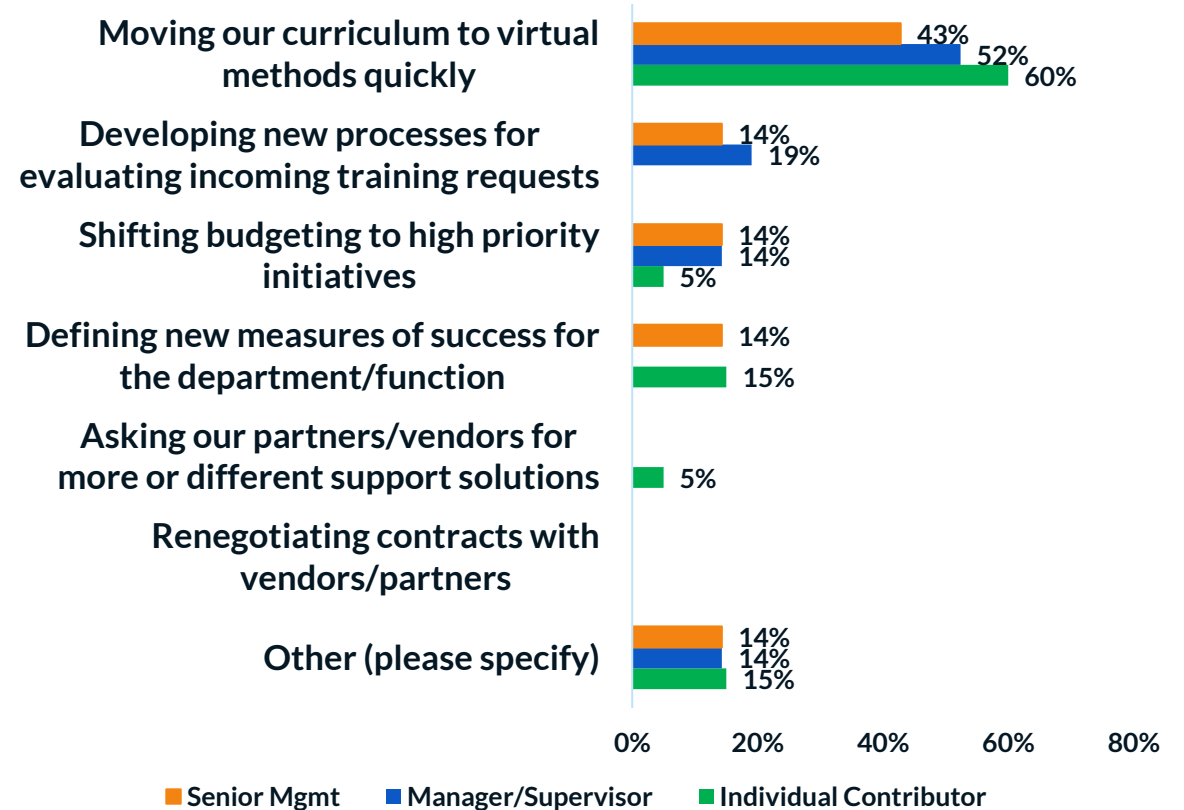
More on top priority



- Different industry seem to have different top priorities during the pandemic



- While moving online is most frequently top priority, senior management seem to have diverse top priorities

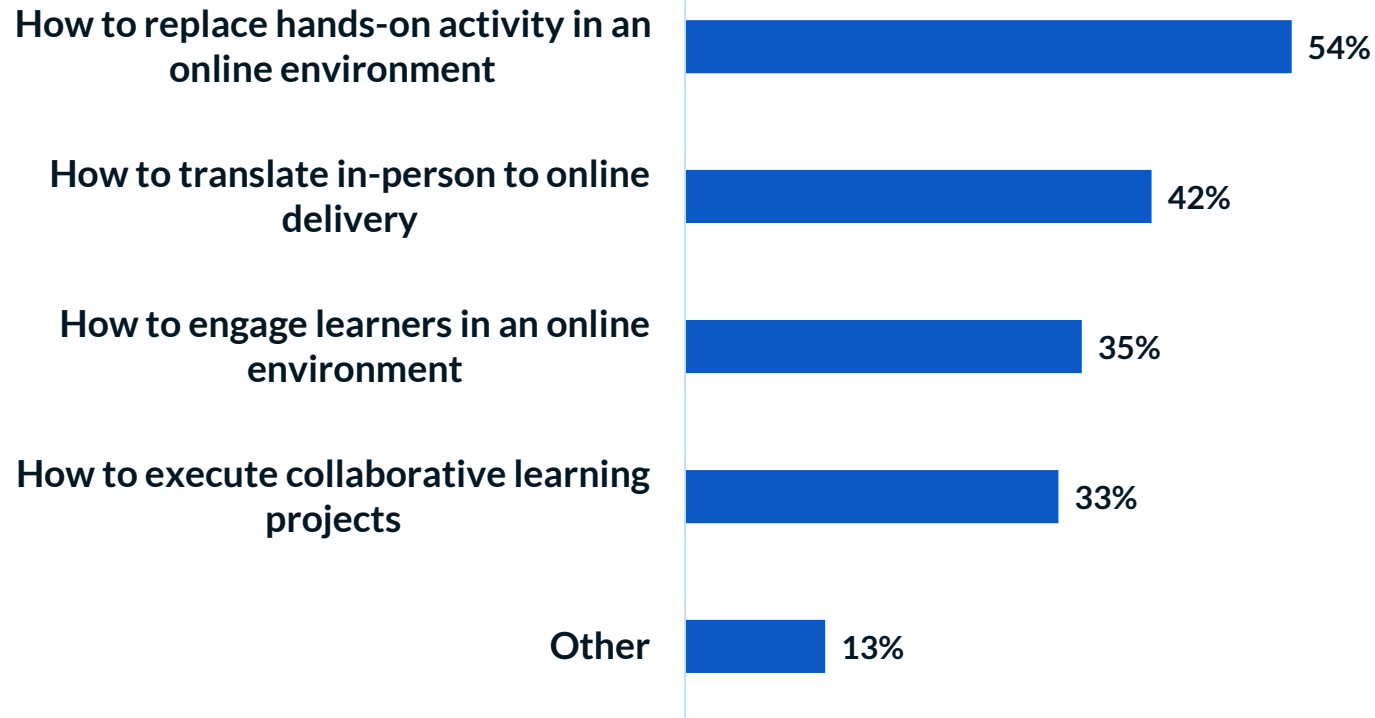




Poll: How well has your organization addressed the top priority of moving the curriculum to online?

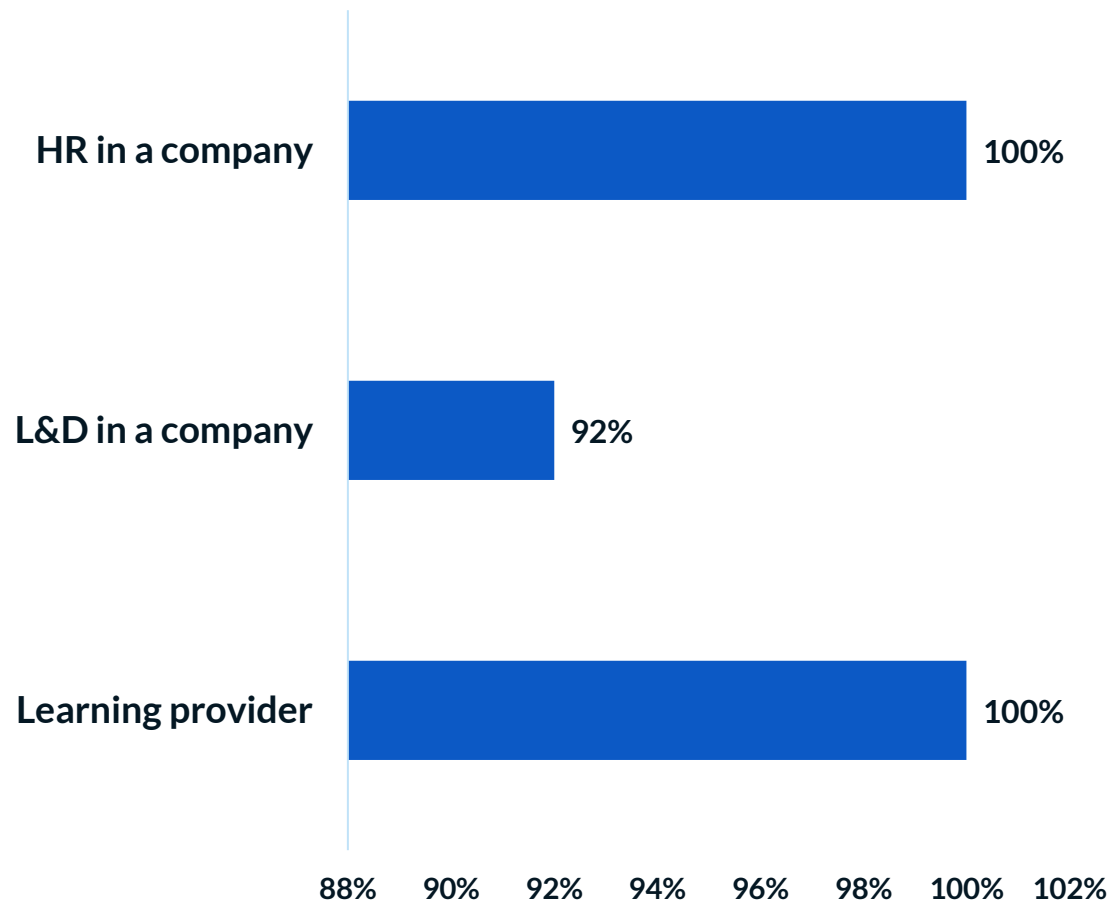
- We made the move to online, and delivery seems to be effective**
- We made the move to online, but we don't know if our courses are effective**
- We are still moving our courses online**
- I have no idea**

Key challenge: replacing hands-on activities in virtual environments



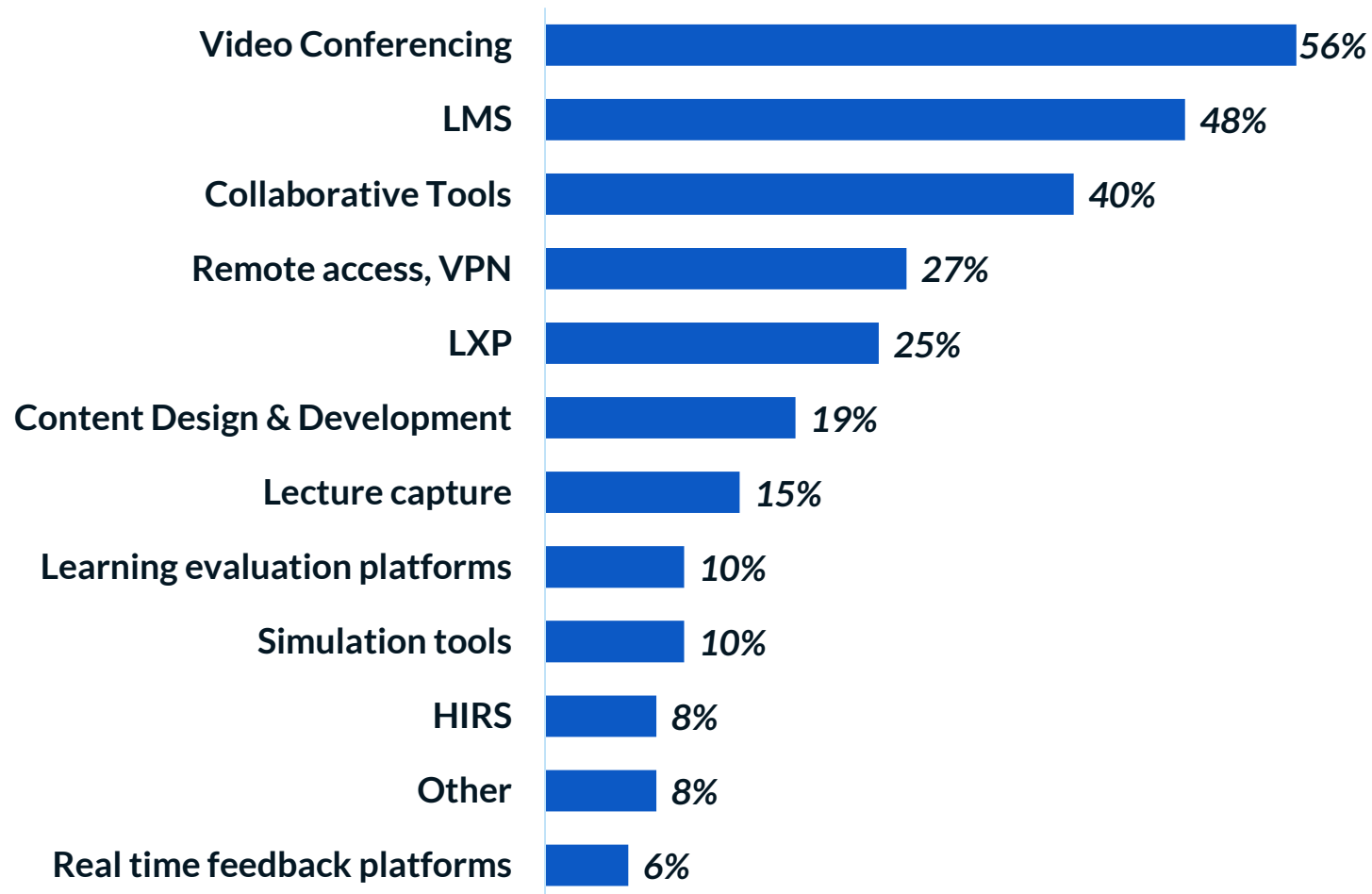
- With everyone working remotely, L&D is challenged with how to replace hands-on activities in an online environment.
- They are also challenged with translating their existing in person suite of course to online delivery

Nearly everyone has the technology to perform their responsibilities remotely



- While most organizations have offices and perhaps some remote work, they appear equipped to handle a workforce 100 working from home.
- Kristine Dery of the MIT Sloan Center for Information Systems Research has studied the ability of companies to adapt to the COVID-19 world. She found that firms that had previously digitized work tended to adapt more quickly to a fully remote workforce

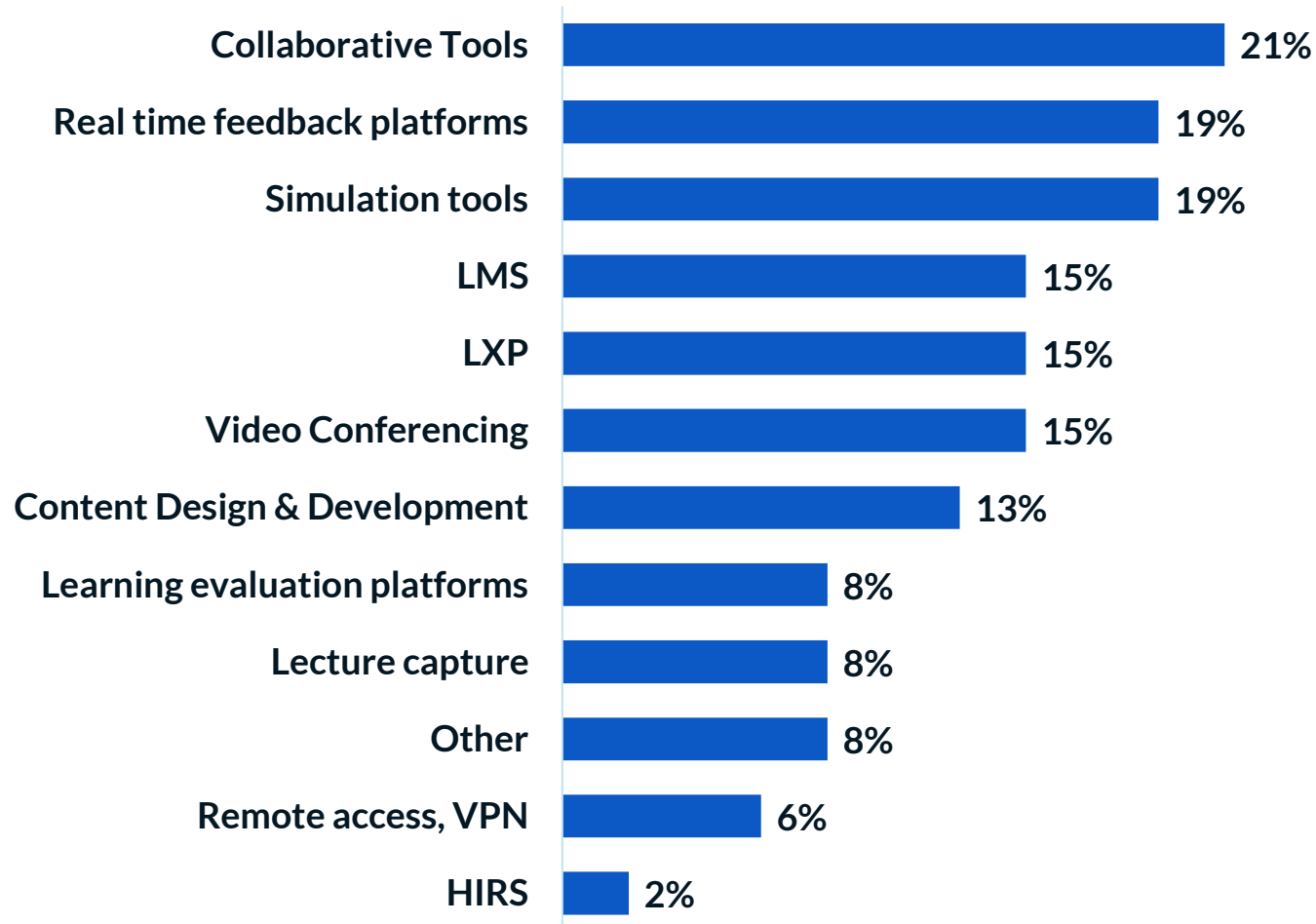
What are the top 3 most important tools for you now?



The top three tools that respondents indicated are most important now are the basics:

- Video conferencing for remote work
- A solid LMS for accessing content
- Collaborative tools to enable remote work

What specific technologies do you need now that you didn't need before?



- Organizations are exploring tools that were not viewed as critical pre-COVID-19
- The most needed tools focus on collaboration, real time feedback platforms and simulation tools



Poll: Have you gotten the new tools you said you needed?

- Yes, I have all the tools I need
- I've gotten some of the tools I need, but I'm still waiting for some others
- I haven't gotten the tools I need
- I don't know, I'm still figuring out what I need
- N/A

Employees need transparency and decisions



- The COVID-19 survey respondents want two things from company leadership: transparent communications, and decisions or strategic direction
- The next two areas of needed support were connecting with colleagues virtually and supporting the health and well-being of employees

Employees need transparency and decisions



Question: What types of decisions do you need from your company?

communications, and decisions or strategic direction

- The next two areas of needed support were connecting with colleagues virtually and supporting the health and well-being of employees

Reflection



01

Top Priority:

- Moving courses to online

Two Key Challenges:

- Replace hands-on activities in an online environment
- Replace in-person with online

02



03

Technology Meets Current Needs
 Nearly everyone agrees that they have the technologies to perform their responsibilities during this pandemic.

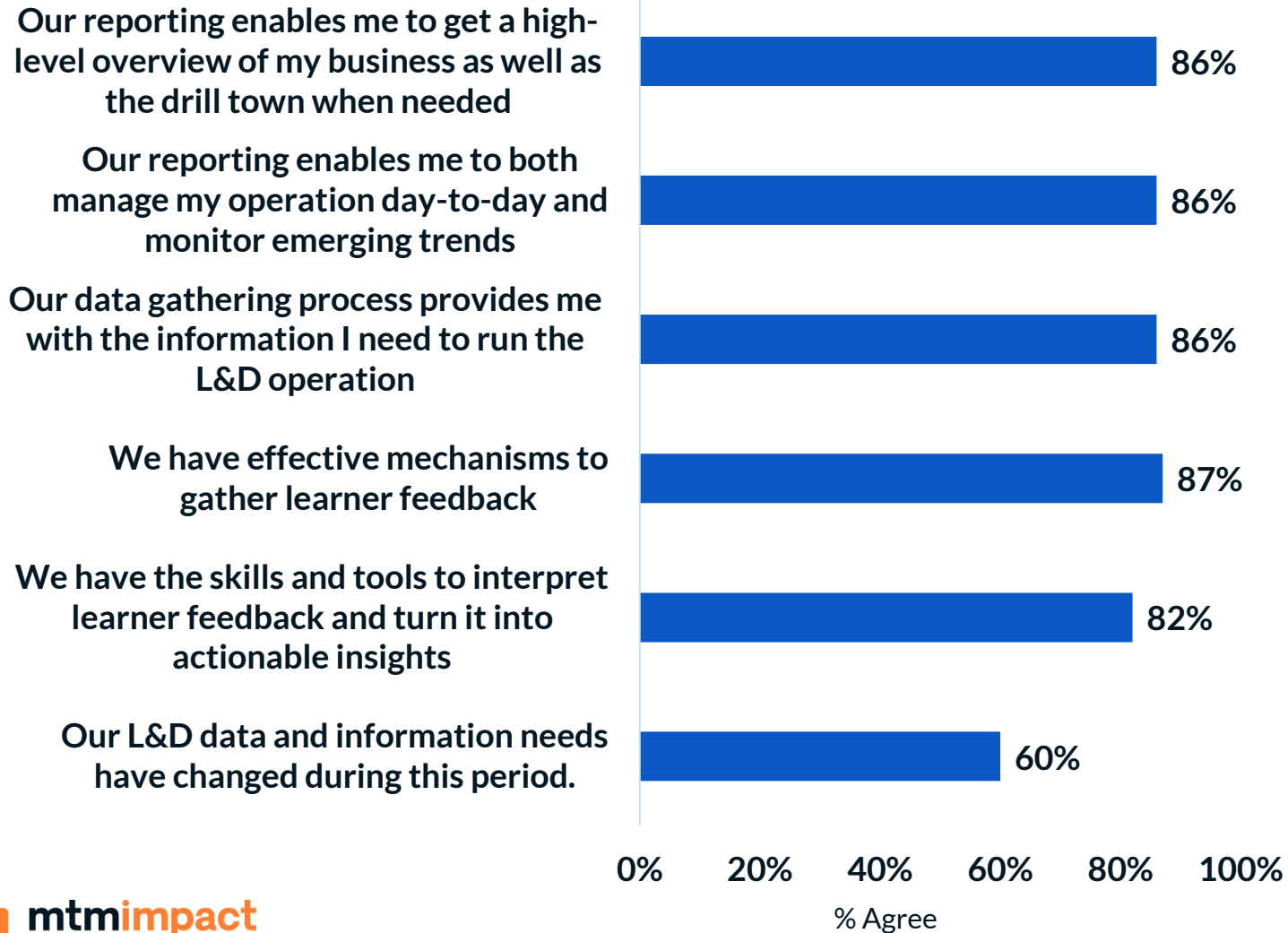
Gap

Respondents report needing some new tools, but don't need tools training. What **else** do you need to be successful?

04



Feedback gathering and reporting

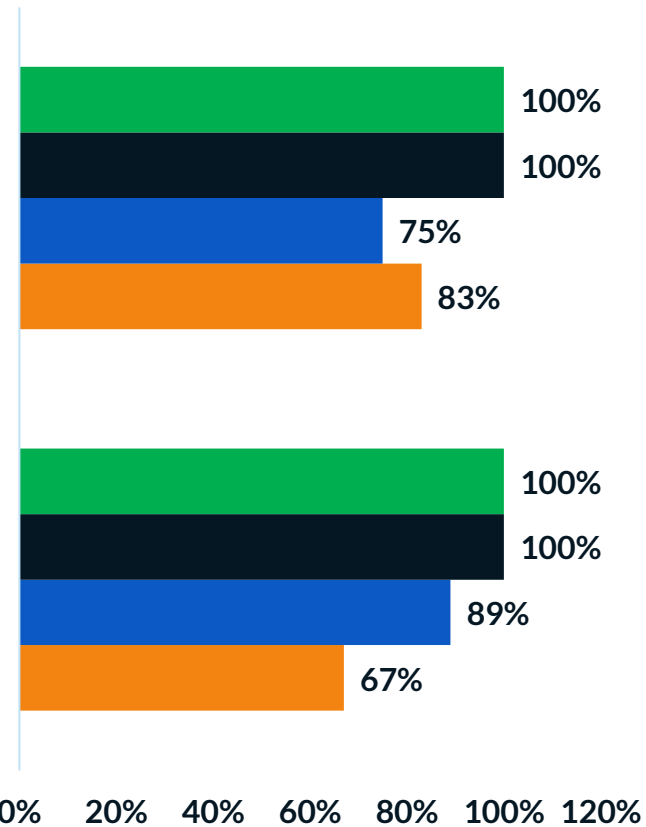


- Most respondents feel that their feedback gathering and reporting capabilities are working
- They also feel that they have the skills and tools to interpret the feedback
- At the same time, 60% of respondents felt that their information needs have changed during this period

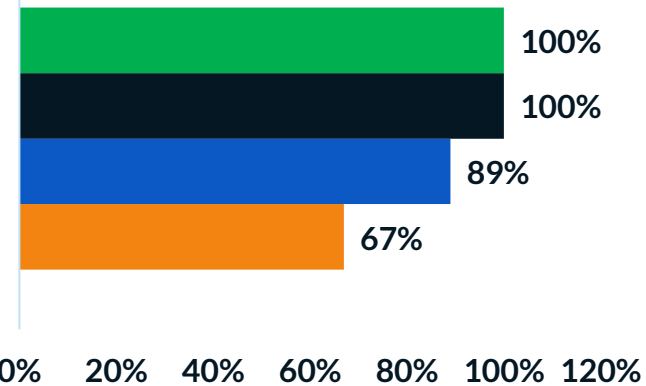
Feedback gathering by selected industry



We have effective mechanisms to gather learner feedback



We have the skills and tools to interpret learner feedback and turn it into actionable insights

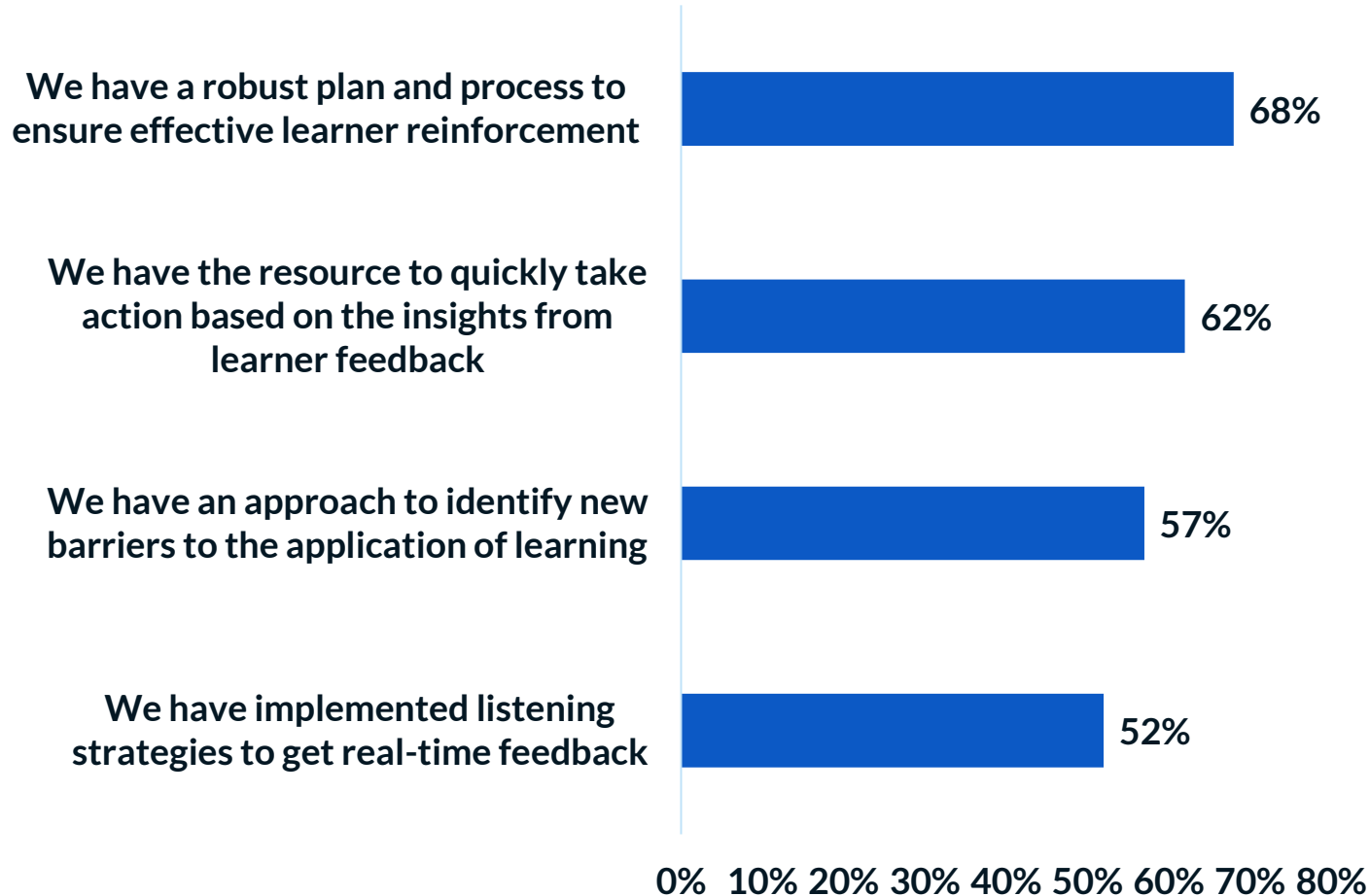


■ Professional Services ■ Healthcare ■ Financial Services ■ Learning Providers

% Agree

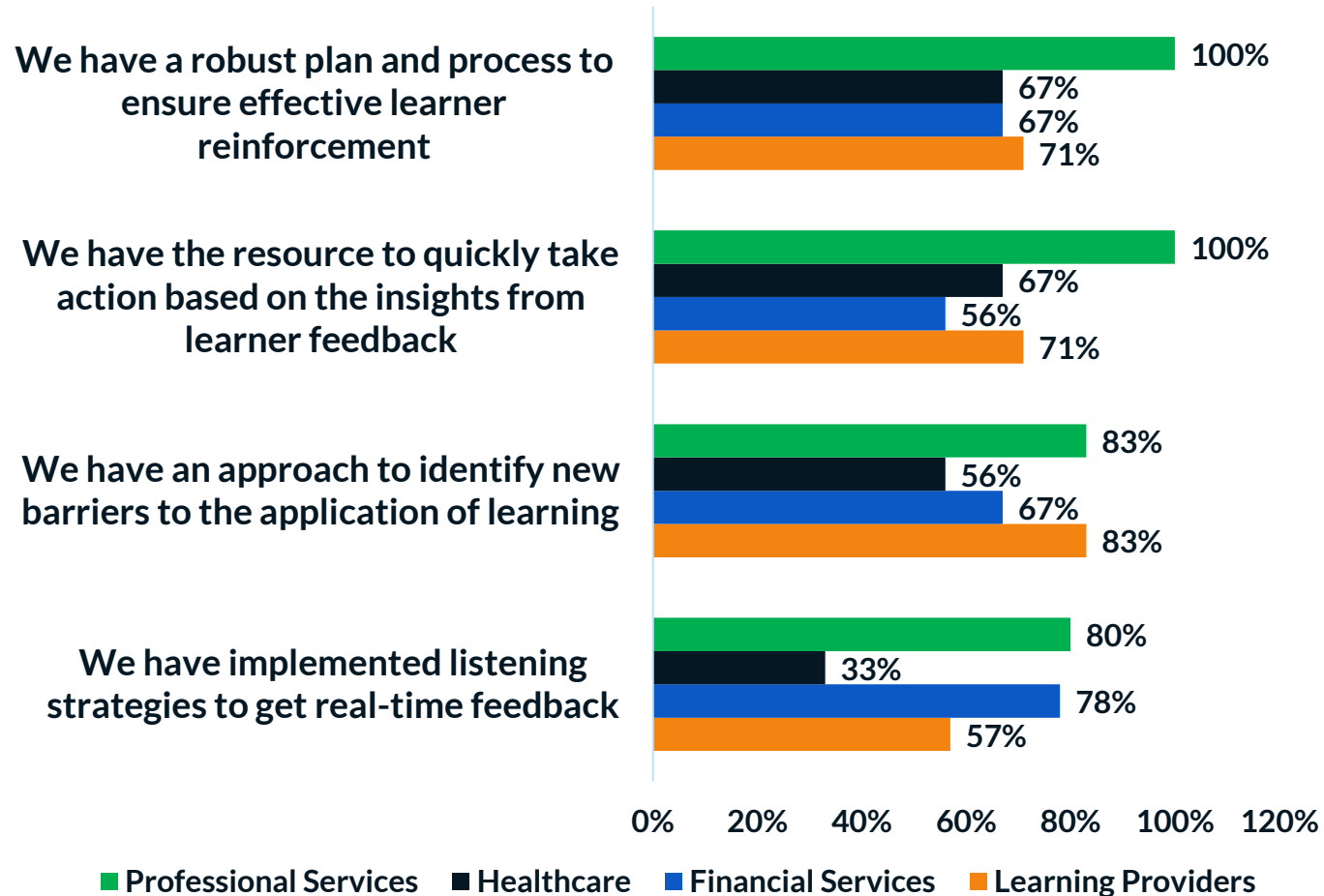
- Of the primary industries who responded to the survey, a large majority feel they have effective feedback mechanisms and the skills to interpret the feedback
- In particular, every respondent working in professional services and healthcare industries reported that they have effective feedback mechanisms and the skills to interpret the feedback

Scores are lower for following up on feedback and implementing listening strategies



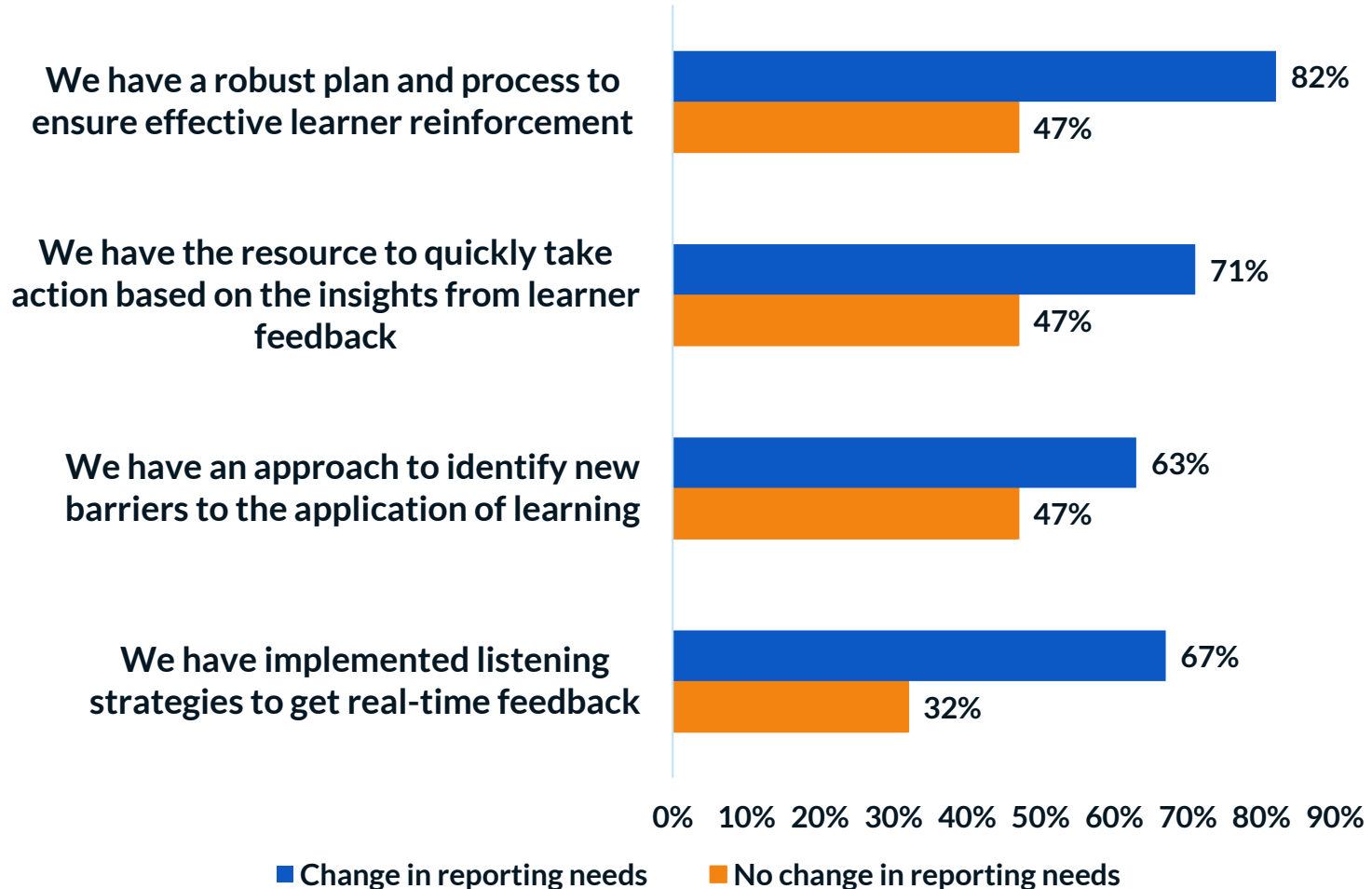
- However, while these organizations can gather the feedback, respondents have less likely to reinforce learning, identify barriers to learning, or act on learner feedback
- Finally, only about half of the firms indicate they have implemented real-time listening strategies

A few industries are acting on the feedback



- Professional Services, Financial Services and Learning Providers report being prepared for the current environment in terms of reinforcing learning and taking feedback
- By contrast, Healthcare firms are grappling with methods to identify new barriers and implementing listening strategies to get real-time feedback

Those who acknowledge different reporting needs also have plans in place



- When the population is split into those who feel their reporting needs have changed vs those who feel they have not, we see some notable differences in their view about learning application.
- Those who acknowledged (and presumably adapted to the changes) are more likely to be more proactive about removing barriers and driving application

Closing Food for Thought

- As we continue to adjust to a new normal and prepare to return to work, enterprise leaders must identify:
 - What, when and how to communicate transparently
 - The most critical decisions to provide strategic direction to your staff
 - How to enable the learning function to quickly adapt to remote learning, particularly for hands-on training
 - The most effective approaches to design learning experiences that had traditionally been face-to-face





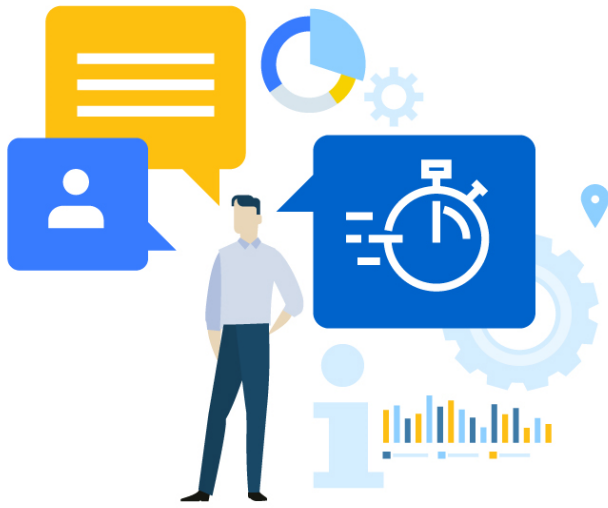
Q&A





Thank you!

For any question, information or suggestions,
contact Yeona Jang at yjang@explorance.com



Appendix: Survey Respondents & Other Analysis

Respondent Characteristics by Industry, Business Function, Organization Size and Job Level

Industry	% of total
Enterprise	81.2%
Consulting	16.7%
Government	2.1%

Function	% of total
L&D	54.2%
HR	35.4%
Other	10.4%

Firm Size	% of total
<1,000	18.8%
1,000 up to 10,000	14.6%
>=10,000	66.6%

Job Level	% of total
Senior Manager	14.6%
Supervisory or management	43.8%
Individual Contributor	41.6%

Other Comments



- Appreciate all our MTM Success Managers, Advisors and Support who have assisted us during this unique transition.
- Our organization still values learning at all levels. However, in the next 90 days it's all about addressing COVID from a patient/colleague care perspective, and Revenue Management. I have a feeling that in the coming months we'll be able to take a breath and step back and discuss OK - what did we learn and what do we need to do differently? But for now, as it related to leadership development, we are only asking these questions in a "brainstorm" way, so that it's on our radar. We are not in much of a place to take action. We did, however, secure additional technology for virtual/hands-on-lab type learning. So that's a win for us.
- We recently acquired an LMS and due to the corona, the implementation is postponed. I believe that as LMS works it should be talk as soon as possible tot MTM.
- In my opinion we also should start with building a new UWV platform with integrated systems.



Questions

- To what degree has the COVID-19 pandemic impacted your responsibilities at work at the moment, on a scale of 1-5
- To what level do you see your role at work has changed during the COVID-19 pandemic, on a scale of 1-5
- To what level do you see that your role at work will change after the COVID-19 pandemic, on a scale of 1-5
- What is your top priority for your organization at this moment? (select one)
- As programs are being moved online, what are the key challenges for you at this time? (Select three)
- Given the changes that have been made in response to the COVID-19 pandemic, please indicate your level of agreement with the following statements (Learner application)
- I have the technology necessary to perform my responsibilities remotely.
- "What specific technologies do you need now that you didn't need before? Select all that apply"
- "Please select the top three technologies that are most important to you now. Select up to three"
- Our L&D data and information needs have changed during this period.
- "How can your company help you perform your responsibilities well during this period? Select all that apply"
- Data gathering: Given the changes made during the COVID-19 pandemic, please indicate your level of agreement with the following statements