

Learning Uncut Elevate Episode 28
Elevate 28: L&D Benchmark Report – The Future of L&D
Hosted by Michelle Ockers



Michelle Ockers:

Welcome to Learning Uncut Elevate episode 28. I'm thrilled to have back as a follow-up to the last conversation in the Elevate series, Dr. Anna Barnett. Welcome, Anna.

Dr Anna Barnett:

Hi, Michelle. Thank you for having us back.

Michelle Ockers:

It's a pleasure. And Gent Ahmetaj. Welcome.

Gent Ahmetaj:

It's been too long, Michelle.

Michelle Ockers:

It has indeed been a long time, hasn't it? Two weeks since our last episode. We're continuing our exploration of the 20th anniversary series of the L&D Benchmark Reports from Mind Tools for Business. So if you haven't listened to the last episode, episode 27, you can listen to this one quite independently, but we go into a bit more background on this longitudinal study, this 20-year study and the learning performance benchmark that underlies the fantastically valuable annual reports that Mind Tools for Business puts out. So, I recommend you go and take a look at that. And Gent and Anna are at the heart of doing the analysis and gathering the insights from this body of research. And we discussed part two of the report, which is looking at the state of L&D today. And then, Anna, you asked a really interesting question for part three, which is trying to take a forward focus, looking into the future to say, well, What's happening out there? What's coming up in the future? And how might L&D play a part in that? And what do we know from the data about what that might look like if L&D wants to play a useful part? Whose idea was it to do that report?

Dr Anna Barnett:

I don't know how this came about, but we decided this year, given that it was our 20th year, that we wanted to do it all a bit differently. So we thought, well, let's, usually in an annual report, and if you've been following our reports, you'll know this, that we do try and cover off the sort of past, present, future, but we tend to focus more on what's happening right now. And that's always what we've done. But this year, we thought, well, how interesting to do a report, start with a report that looks back over 20 years of our works, then focus on where we are today, and then focus on what does the future look like. And it seemed very logical to do it in that order. And of course, they build on each other for that reason as well. But yeah, I think it was a joint decision, ultimately, I think.

Gent Ahmetaj:

Very kind of you, Anna. I'm not sure I had a lot of input into it.

Michelle Ockers:

Yes. So the third report, and although they're part of a series, there's three standalone reports. I'll pop a link to this one in the show notes. The title is really dramatic. Megatrends reshaping the future, the crucial role of L&D and business transformation. Very dramatic and very aspirational, Anna. So thank you for setting our sights on the future. So you were building on a body of research that already existed about L&D practices for high performing teams in the past and today. But then, of course, when you're looking at the future, there's

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additional research you had to do, right? Talk to us about the research, like the additional research process, what you needed to do and how you went about that.

Dr Anna Barnett:

Yeah, I mean, I was very fortunate, actually, that I started this report after I'd finished writing the other two. So I had that sort of background all ready to go. It was all fresh, all the data that I'd been exploring. And the first thing I did, actually, was sit down with you, Michelle, and we had a brainstorming session. And we just thought, because although I know the data very well, I think what I lack is that experience of understanding, well, what does this look like in practice? And how are people actually doing this job? And so we sat down together and we had a really useful session and put everything down onto paper that we thought would be very interesting sort of topics to explore, avenues to kind of look down. And that's when the real work starts, because then you go and have a look at our own data. We consulted that. Then we had a look at other industry reports that have looked at these various topics. We did academic literature searches, which a lot of people know.

Michelle Ockers:

We is very generous, Anna. I want to make listeners very aware that I wasn't part of the way doing all this research. I knew you had a team working with you at Mind Tools for Business, or is it the royal we? Is this Anna and Anna and Anna doing this research?

Dr Anna Barnett:

It was Anna, Anna, and Anna, I think. And you did join in. So there was, yeah, a lot of kind of extra work that comes in after we've kind of thought a little bit more about, well, what could we do? And then you start thinking about, OK, what does this look like? And so, yeah, we consulted the academic literature. We consulted over industry reports. We consulted our own data. And we looked inside and outside of L&D. So when you're looking at, say, academic reports, you don't only have to stay within our industry. You can look at, well, what's happening in different sort of areas and different ways of people learning, whether that could be, you know, in a university setting, for example, what does that look like? Is there anything we can learn from that? And so there was a yeah, quite a long process. And then what we did is we used other sessions. So we have our learning innovation group, where we bring L&D leaders together to talk about different topics of interest. And we often use these both for their purposes and also for ours to sort of brainstorm and find out what sort of challenges they're facing right now and how is that important and, you know, does that shine light on topics that we then should be focusing on. And then we have the peer review process where we do share, you know, our writing with other people in industry experts across all sorts of areas and they contribute to the report so when you read the reports you'll often see people pop up with a little quote or a comment on something that we've been talking about because they have that extra layer of knowledge that we can't capture on our own.

Michelle Ockers:

Yes. And I was very happy to be invited to be part of that peer review process. Thank you very much. And so there were three trends that you ended up selecting. Just run through those three trends briefly before we dig into a couple of them. What were the three trends that you picked, the mega trends?

Dr Anna Barnett:

So we went for digitalization, we went for climate change, and we went for demographic shifts. And I think actually our reasoning behind all three was slightly different. So digitalization was an obvious one. Last year, actually, we dedicated our annual report to rapid digitalization and focusing on what that means for L&D and how we can survive during

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the world that we're in in terms of technology. And of course, right now, even just in the last 12 months, the advances that we've seen when we think about AI and the impact of that, it's hugely relevant. So it was a really obvious one for us to think about. The second, climate change was a little bit more challenging. When you're Googling sort of mega trends, it's the number one that comes up every time. Of course it is, it's such an important area for all of us to be thinking about. I think honestly, and for me, I didn't quite know the impacts perhaps that L&D could have in this area, or where does L&D really fit in? I was very wrong. We've written a whole chapter on it. So there's an awful lot in there that shows where L&D does fit in. But again, that was probably the more challenging chapter for me to sort of tackle, but also the most enjoyable for that reason, I think. And then finally, we looked at the demographic shifts, thinking about ageing populations. And this was sort of led a little bit more about having conversations, I think, with even our own clients at Mind Tools, people sort of L&D professionals telling us that we really care about new generations perhaps entering the workforce. So then we were thinking, well, if you care about it, let's have a look at it. And it started to become very, very interesting at that point.

Michelle Ockers:

I think that was my favorite one to dig into, but we can come to that in a moment. You've picked a couple of key ideas that you'd like to talk about in today's conversation. The first one was the importance of digital intelligence as an L&D capability. And you've been very careful to use that term. And I know some of the teams I work with grapple with what's the right term for digital literacy. And I think people are moving away. What I'm seeing in organizations, people moving away from the term digital literacy and playing with other terms. Digital intelligence and the distinction from being tech savvy. What is digital intelligence, Anna?

Dr Anna Barnett:

Yeah, so it's about applying kind of knowledge and skills to be able to interact with technology in meaningful ways. And I really like it as a term. It was introduced to me by an industry expert, Ross Stevenson, from Steal These Thoughts. And if you don't follow Ross, I would recommend it. He's got some fantastic stuff out there. But he introduced me to the term and I then thought, actually, it makes a lot of sense when you start looking into it. And like you just said, Michelle, it is so distinct from tech savvy. It's not about having a proficient use of technology, being able to use it in that sense. It actually goes well beyond that in terms of applying knowledge, thinking about how do we actually use this in meaningful ways, and then how do we make decisions based on that that are led by the knowledge that we have and the understanding that we have of this as a particular tool and its impact for us as a business and how does it fit in and does it support what we want to achieve essentially, the goal of the business, how do we make sure that technology is being used in the right ways and supports the capabilities that we have in the organization as well. Yeah, so I think DigitalInTouch really covers that off in a way that I think it makes it a capability we believe will be one of the more essential L&D capabilities in the next few years, perhaps even right now. And each year, our research at MindTools evolves as well, and it will be added to our capabilities to track. As an L&D, we do do capabilities, and I think this is one that we definitely have to have in there.

Gent Ahmetaj:

We keep growing the list and we always need to take something away as a result.

Michelle Ockers:

Well, it's really interesting, isn't it? And it says something about the breadth of skills that we need to bring to our roles in L&D these days, because the nature of the role and the kind of contribution we're trying to make has shifted so much. Yeah, it's very challenging, I think.

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And do you have any insight at this point about the level of digital intelligence in L&D, or is that something that we need to wait out for the future as the benchmark unfolds?

Dr Anna Barnett:

I mean, we have insight in different ways. So one of the things we also track is how often people are using or experimenting with technologies in the workplace. And one of the things that we've seen is that even though AI, for example, has become hugely popular and everybody's talking about it, still only about 16% of L&D leaders say that they are using it or experimenting with it in their organizations, which is a really, really small number. And we've been tracking this statistic over the last few months, even as fresh data is coming in through our learning performance benchmark. And we're still not seeing a huge amount of change. And so when we talk to clients or L&D leaders in part of our learning innovation group, we have these conversations. There seems to be a real reluctance or nervousness, perhaps, of not quite knowing where to start or what to use. And then we talk to others who are getting caught up a little bit in just implementing it because they know it's popular, they know that it's new, there's maybe pressures to start using it, and therefore they're not going to get the best out of it. So this is where that digital intelligence comes in. It's about having the ability to understand Well, why do we want to use it? Is it appropriate? And if it's not, that's fine. And just being able to have the confidence to say, actually, no, it's not going to work for our business for these reasons. Or yes, it's going to work because it's going to help us achieve what we want to achieve.

Gent Ahmetaj:

This is also where partnering comes in very, very heavily. If an L&D team has good partnership with technology and other departments, whether that's data science department, if you are a large organization, understanding what something like AI technology can do for learning versus having in-house data analysts, which I would say is very, very different to a data scientist or an AI researcher, et cetera, which doesn't have as deep knowledge in terms of usability or governance structure or data quality issues that come with something like an AI model. I think it just shows how important it is, the partnering angle.

Michelle Ockers:

Absolutely. I think AI, maybe it's a little bit of an extreme example because it is so different and so new as a piece of technology. And there's a lot of debate around the ethical considerations and organizations trying to figure out their policy. But nonetheless, I think it's kind of highlights the extremes of the behavior. And I think, Anna, the point you just made there is a really good point. It is kind of like two sides to the tech coin. One is experimenting with things, making sure you're aware of them so you understand them well enough to make choices about where and when to use them, but also that question around coming at it from what am I trying to achieve in the organization and what kinds of tech might best enable and support that. So two sides of that same coin that you're bringing together there for digital intelligence. Let's move on to diversity in the workplace, which was the bit I got most excited about reviewing it and doing a little bit of background support on this report with you. What's the opportunity for diversity in the workplace and how might L&D approach this?

Dr Anna Barnett:

Yeah, no, I was really grateful to you, Michelle, because you helped me reframe my thinking about this as a topic, because I was a little bit saturated by L&D professionals talking about, oh, you know, we need to be prepared for the new learner. We need to be thinking about Gen Z and what does that look like? And how are we going to be able to support them in the right ways? And so I actually went into this probably a little bit tunnel vision, because I thought, well, obviously generational differences, they exist. And, you know, we need to be we need to be looking at those and we need to understand the new learner. And I think you

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kind of allow me to say, well, hang on, let's just step back a minute and let's actually look at the data to understand what are generational differences there, or are they as meaningful as we might think they are? And are those differences a problem? Do we need to iron them out? Or actually, do we just need to leverage them and, you know, therefore benefit the business because of them. And it completely changed my whole thought process. And I was so grateful because it just opened up and I started looking at other different areas of research and, you know, academic research as well. You had all sorts of different perspectives that really summarizes and we tried to get some of that into the report where we can. And I think it's about, I think the key message of this is about, you know, not trying to focus too much on supporting the new learner that you risk kind of neglecting those at the other end of the cycle. So, you know, those knowledge sources that we've had perhaps in the business for a long time or who have, you know, been able to make key decisions or have capabilities perhaps even that maybe newer people entering the business don't have. And it's about thinking about how do you kind of hold on to those people, how do you make sure that when they're exiting the business we can still kind of leverage them. But then also how can we bring those in the business together to collaborate, to coach each other, to reverse coach, to make sure that the relationships are strengthened, there's lots of opportunity to learn from one another.

Michelle Ockers:

In the report, Ross Stevenson again, sorry I keep mentioning him, but he did make a... I'll put a link to some of his stuff and he's, if you want to look at Ross and some of the things, his perspectives and follow him as well.

Dr Anna Barnett:

Yeah, I've learned a lot from Ross and that's been really useful, but he did make the point in the report and I added a quote from him about if we focus too much on technology and then the capabilities that maybe new employees will have coming into the workforce, then we may end up in a position where the human skills will suffer potentially, or we may end up in a place where we do have gaps and we need to try and make sure that we're simultaneously thinking about both technology but also everything else that is so important and makes us humans and makes us able to do our jobs properly and I think he's absolutely right. There's a balance to be had. And I think this leveraging diversity is a fresh perspective. It's a positive perspective on something that I think most of us are a little bit more anxious about.

Michelle Ockers:

Yeah. And the quality of our thinking, our ability to problem solve, our ability to innovate, which at the end of the day is kind of real learning, right? It's always improved by diversity and perspective and drawing on different experiences that people bring to the workplace. So five generations in the workplace is actually an amazing opportunity for learning, right?

Dr Anna Barnett:

Absolutely. Yeah.

Gent Ahmetaj:

Huge opportunity. There's actually a lot of research about the types of tasks that benefit most from a diverse workforce. And a lot of the findings point to the fact that complex tasks are better done by a diverse workgroup or diverse project team, primarily because it leverages outside-of-the-box thinking, you know, lack of assumptions between each other's thinking, whereas if it's a homogenous group in is that you know what the other person is thinking or you have similar experiences or you've gone through similar things the approach will be very similar so therefore more one-sided. I thought there's a whole literature stream

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on this there's a lot of literature like there's a lot of literature on this and super super fascinating.

Michelle Ockers:

It is. It's really interesting. And you mentioned coaching there. I think you mentioned reverse mentoring or reverse coaching and so on, which brings us to a third thing that ties all three reports together. And I think it's really nice to kind of end on something that's going to tie all of these three reports in the series together, and that's coaching and collaborative learning as consistent approaches or markers of maturity. Talk to us a bit about that finding and maybe a little bit about what's in the report about what approaches to coaching and collaborative learning might look like in the future, Anna.

Dr Anna Barnett:

Yeah, so we identified this in our first report. So when we were looking back over the last 20 years, one of the things we were trying to do was to identify, well, what was happening or what were we doing when perhaps, you know, organizations were at their very best? What are the sorts of learning approaches that really stand out? What has been consistent? And it was quite obvious quite quickly that actually coaching collaborative learning were the two things that really sort of helped sort of top performing teams shine. We know, just to sort of give you some statistics, we know that about 82% of top performing L&D teams have coaching skills in-house. The global benchmark is about 43%, so a huge difference between top performers and everybody else. But we also know that they're twice as likely to have collaborative learning skills as well. And so there's a real focus by these organizations that has been consistent. So that's I think that's the key here is that they kind of they adapt, but they keep those two approaches to continuing, if that makes sense, so that they're kind of they might, you know, use new technologies to facilitate them but they're still really holding coaching collaboration at the heart of what they do. And these two areas kept sneaking in through the data in all sorts of ways. So they appear in the second report, which you can listen to from last session. And then they come in this report. And every time I see them crop up, I get really excited because I'm like, here is a great example of what this could look like or what this means. And yeah, in thinking about what they might look like as approaches in the future, one of the sort of more stable patterns that has emerged in the data over sort of the years is about employees preferring to access learning related resources at the point of need. And that we don't predict that's going to change anytime soon, but actually really supports the efforts of L&D teams that want, you know, learning to exist in the flow of work. People want to be able to just, you know, learn as they need it, to go, you know, pick up their portable device or whatever it is. And so I think in the report this time we talked about, well, we need to make sure that coaching collaboration exists in that space as well, that you can just have them in at the point in which you need them, it becomes so embedded into sort of the everyday of how we work and we learn. And now we already have options from a tech technology perspective that can support these sorts of approaches, you know, we have mobile apps with sort of AI powered chatbots that can be useful, we have wearable technologies, which aren't yet mainstream at all, but potentially could be in the future that can support, you know, those learners, perhaps that are physically disconnected, either by working remotely, or perhaps they're deskless, so they're on the shop floor, for example. But also those that just prefer to access information when they need it, you know, and they don't want to be putting time aside to do formal learning in that sense, they want to be able to just access people as they need them. And I think that's what we need to be thinking about a little bit is, well, how do we just bring these approaches, this coaching, this collaboration into that space and make sure that we don't neglect them in any way.

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Michelle Ockers:

I think it's part of the integration of work and learning as well. And, you know, we've had tech that would enable these kind of practices for a long time, but perhaps not really understood how people are using them. I think when I was at Coca-Cola Amatil, so this would have been around 2014, I think I was looking into the connection between people working in equipment maintenance on different production sites and asking them, who do you turn to when you have a problem you can't solve? If you've got a really tricky issue with a machine and you can't figure out what's going on, who do you turn to? Where do you go for help? Now, a lot of people just turn to someone who was at their site and was like, well, what if you can't find someone at your site? And I think it was pre-WhatsApp, I think they were using FaceTime to actually call someone at another site who had a similar piece of equipment and they'd say to them, take a look at, like use a video, take a look at what's happening with this equipment, listen to the sounds I'm hearing, what's going on, can you help me? And it's just a great example, you know, that's learning in action, right?

Gent Ahmetaj:

And it's shown in the data too, Michelle. When we collect data from employees across the world, the top thing that comes out every single year, no matter where we collect the data, no matter which region, where it's working in collaboration with others, is the top way people solve challenges. tasks. And it is very, very interesting, because it's right in front of our eyes, how people do it. It's a matter of how do we facilitate that with either technology practices, rituals, whether that's visual cues, I think we underestimate the power of like these small things that can have huge impact on just the motivation, the possibility or the opportunities. It's very much like that.

Michelle Ockers:

There's so much more we could do with that. And one of those kind of mindset things is, well, what if part of our job is just to connect people more effectively across the organization, have better conversations with each other without us having to play any part in those conversations, you know?

Dr Anna Barnett:

Sorry, I'll just say again, it's like you've just made the point is that employees are telling us they already value working with their people. So the hard work's done. You've not got to convince people it's a good idea. You know, they already know it's a good idea. So actually, like you say, it's about, well, then how do we just make that easier for them so that they can do what they actually want to do? And that is to work together.

Gent Ahmetaj:

That's where I think, and this is not spoken enough, actually, in our industry, which I found very interesting because it's spoken very much in academia. It's, the overarching view of individual learning is very different to team learning. Team learning is very different to organizational learning. These three things are very interconnected, but they are very, very vastly different things. In a lot of cases, we talk about individual learning, but we miss the link because knowledge management, knowledge retention, applicability, usability, all of that stuff is at the organizational level, it's not at the individual level. Making these links between these three levels is absolutely integral to a good strategy, I would say.

Michelle Ockers:

And it's truly where you get a learning culture and a learning organization. I get very frustrated. I'm going to make this last point. I won't go into it for too long. I won't have a rant. But when people talk about we've got a we've got a great learning culture because lots of individuals are engaging with lots of things on our learning management system. We're

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using lots of resources. Lots of individuals learning does not equal a learning organization, I think, is the key point there. That connection is so important.

Gent Ahmetaj:

There is a really good quote by a scholar in the 1980s or 1990s, just saying that individual learning is critical to organizational learning, but it's not sufficient for it. It's not, you know, it just won't be enough to have organizational learning.

Michelle Ockers:

Yes, I think I've got a paper that talks about that from the 1980s. Might be the same person. I might see if I can add that to the resources. Anna, is there anything else you haven't had the opportunity to share with us around that third report, the megatrends reshaping the future and the role of L&D in those?

Dr Anna Barnett:

I think I would just like to offer the advice to those that read it to go into it and understand that what we're talking about and a lot of the solutions, I suppose, or the tips and advice that comes out in that report isn't new. It's not new information. It's stuff that we have actually been talking about for a long time. And so we're not expecting anyone to pick this up and go, right, we're gonna have to completely reinvent the wheel here. It's actually about, no, there's certain things like coaching and collaboration that have, you know, stood the test of time, they've been proven to work. So it's just about trying to think, well, how do we make it happen in this sort of newer context, you know, whilst we're sort of figuring out what, you know, climate change or whatever it is, it's about trying to kind of make sure that they still can endure, I suppose. So it's yeah, it's kind of trying to help people understand that it's not about sort of reinventing the wheel, I suppose.

Michelle Ockers:

Well, and that's the beauty of a 20 year body of research, right? We've got lots of good evidence to draw upon. OK. Anna and Gent, thank you so much for joining me for this second episode, exploring the Learning Performance Benchmark and the Annual Report Series for 2023. And thank you also to all of your colleagues who are involved in supporting and undertaking this research and making it available publicly for anyone in L&D to tap into. It's much appreciated.

Dr Anna Barnett:

Yeah, thank you, Michelle, as well, like I say, for your contribution to this report as well. It's been really valuable having your insight and knowledge that we've been allowed to tap into.

Michelle Ockers:

It was good fun, too. Thank you. Thanks so much.

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Learning Uncut are learning and development consultants that help Learning and Development leaders and their teams become a strategic enabler so that their businesses can thrive. We work in evidence-informed ways to drive tangible outcomes and business impact and are strong believers in the power of collaboration and community. We specialise in helping to build or refresh organisational learning strategy, update their L&D Operating Model, enable skills development, and conduct learning evaluation. We also offer workshops to shift learning mindset and practices for both L&D teams and the broader workforce – as well as speaking at public and internal events.

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About your host, Michelle Ockers



Michelle is the co-founder and Chief Learning Strategy at Learning Uncut. She is an experience, pragmatic organisational learning strategist, L&D capability builder and modern workplace learning practitioner. She also delivers keynotes, workshops and webinars for learning and broader professional or workforce groups at both public and in-house events.

Michelle received the following prestigious industry awards in 2019:

- Australian Institute of Training and Development Dr Alastair Rylatt Award for L&D *Professional of the Year – for outstanding contribution to the practice of learning and development*
- *Internet Time Alliance Jay Cross Memorial Award – for outstanding contribution to the field of informal learning*



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