

Mobile Learning Will Lead The Charge For Corporate Learning In New Workers' Environments

Enterprises Built To Change Will Last
Through Change

Table Of Contents

Executive Summary	1
Key Findings	1
Firms Across North America Are Evolving From A Traditional Approach To Corporate Learning	3
The Current Approach To Learning Is Not Adequately Addressing Your Employees' Needs	4
Firms Must Overcome Challenges In Mobile Learning To Have A Successful Learning And Development Strategy	6
A Feature-Rich Mobile Learning Platform Will Guide You Toward Success	7
Key Recommendations	10
Appendix A: Methodology	11
Appendix B: Supplementary Graphs And Demographics	11
Appendix C: Endnotes	15

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Executive Summary

The learning expectations of today's workers have changed. Traditional classroom and eLearning courses have less relevance in today's corporate, fast-paced environment. Our research shows that online learning is as effective as — and in some cases more effective than — classroom learning. Technology enables fast, efficient learning and allows for in-depth analysis and problem-based learning. Digital disruption affects the tools, content, and delivery methods that make up your learning strategy. It's time to give them a facelift.

The eLearning courses assigned to workers have value, but for most organizations, it's time to examine different approaches. Digital technologies meet employees' work needs in context and go beyond self-paced eLearning, virtual classrooms, and classroom instruction — while incorporating these older approaches as appropriate.

In the future, learning content will be part of employees' daily lives. Whether they wish to find a short chunk of learning needed to do work, collaborate on a project, or determine the business impact of learning, the content in the future will showcase new and retooled functionality. Above all, employees will have a user-friendly interface on their personal devices that provides tailored, personalized learning experiences.

Learning and development departments understand the need for mobile learning, reflected in the growth of adoption of mobile learning across organizations in North America. Many organizations often struggle to implement mobile learning, even as they recognize the pressure is “on” to provide content in mobile-ready formats. This struggle is a result of a combination of factors, such as traditional learning behaviors, legacy learning content, lack of financial resources, and outdated technology.¹

But corporate training departments face a major problem: With so many technologies available to use for online and, in particular, mobile learning, how do business leaders identify the most effective technologies and maximize the value of mobile learning? What do the employees really need? What are the key challenges that learning leaders have?

In December 2016, Adobe commissioned Forrester Consulting to evaluate some of the key challenges, drivers, and trends that businesses are facing in regards to corporate learning. To explore this trend, Forrester conducted a custom study to identify key business trends,

challenges, and drivers for learning across industries. The study included in-depth surveys with 161 senior HR and learning and development (L&D) leaders in the US and Canada.

Key Findings

This study yielded a number of key findings:

- › **While Millennials form a larger share of the workforce, mobile is important for all.** The composition of the current workforce in North America has changed. More than one-third of the entire workforce in the US was born in the 1990s or later. Though it is easy to equate the Millennial workforce with new technologies, a high usage of mobile devices across all workforce age groups has bolstered the importance of mobile-based technologies. Corporations must realize this and adapt their learning strategy to accommodate the needs and behavior of their workforce.²
- › **Traditional learning approaches will no longer be sufficient.** Traditionally, organizations have relied on learning approaches such as face-to-face classroom sessions, curriculum-based learning courses, and on-the-job learning. While these methods are still effective, they lack the scalability and ability to reach your employees in the need of the hour.

“We find from our research that those in their 40s and 50s care about mobile, too. eLearning on mobile is not merely a Millennial thing; it’s about maximizing employee performance. We use it to fit learning into daily schedules of employees — for people to learn whenever they can, however they can.”
— Digital learning leader, large global conglomerate

- › **Organizations will develop more mobile learning content.** Organizations across North America understand the need to evolve their learning strategy. The HR and L&D leaders we interviewed highlighted the need to develop feature-rich content that is more accessible to employees in their moment of need, thus making it more effective. We further learned that mobile takes center stage for the development of new content in the future for corporations across industries in the US and Canada.

- › **Mobile learning will increase the effectiveness of learning programs.** Through mobile learning, organizations will be able to author and deliver shorter, more targeted content, focusing on the specific needs of the employee on the go. Mobile learning will allow L&D leaders to treat their employees as customers and deliver an enhanced workforce experience by allowing flexibility and ease of use in consuming learning content. It will also ensure higher completion rates and improved dissemination of knowledge across the organization and in the larger ecosystem.

- › **There are several challenges in implementing a comprehensive mobile learning strategy.** Implementing a comprehensive and successful mobile learning strategy is not easy. There are several technical challenges, such as the setup of infrastructure, configuration for several device types, and security. It is also challenging for instructional designers to develop mobile learning content. Additionally, with the availability of many tools and platforms, learning leaders find it difficult to ascertain the right platform for authoring mobile content.

Firms Across North America Are Evolving From A Traditional Approach To Corporate Learning

“Is my flight on time?” “Where do I book a table for three for Chinese food now?” “How long will my commute home take?” Your customers are experiencing a mobile mind shift: the expectation that they can get what they want in their immediate context and moment of need. When they need something — anything — they turn to a mobile device and ask for help. Every interaction reinforces the concept that one’s mobile device provides the solution to every question or problem. And this seismic shift in behavior translates to your workforce.³

The rise of Millennials in the workforce, an increasing employee demand for technology flexibility, and a focus on the employee experience continue to challenge traditional work procedures. Seventy-two percent of information workers surveyed by Forrester in 2016 use smartphones for work, and 43% use tablets. The speed of this transformation is also revealing: From 2013 to 2015, the use of smartphones and tablets at work increased from 39% to 67% for information workers in North America.⁴ The time spent using these devices for work increased 17% — from an average of 2.3 hours a day to 2.7 hours a day, according to Forrester’s Business Technographics® survey data. As

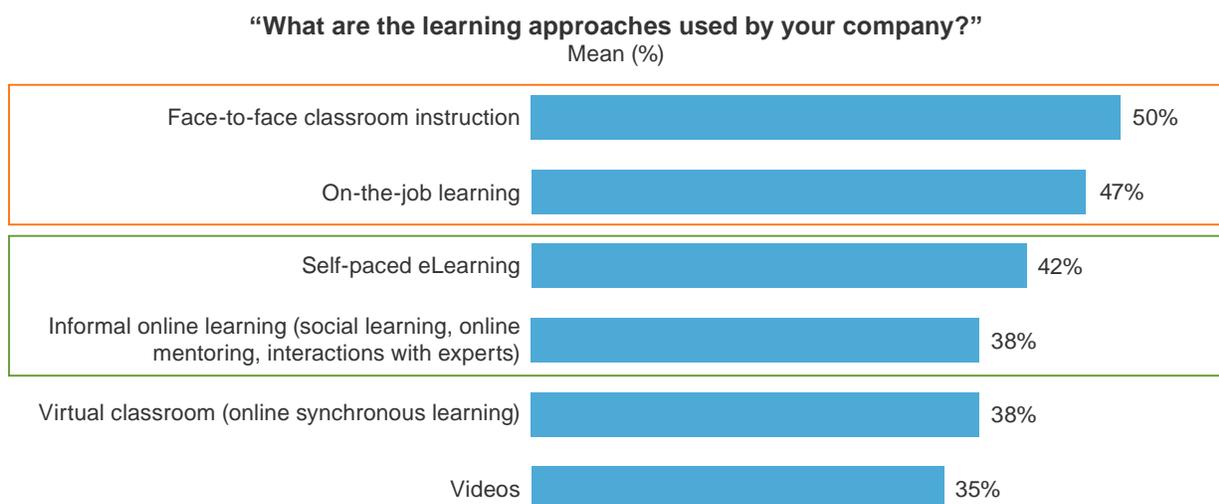
employee expectations from mobile devices in their personal lives increase, their expectations in professional environments also rise proportionally. As a result, your workforce will demand more from corporate learning.

The current boom of digitally savvy employees will change the way people work and the way people learn. Organizations in North America need to evolve beyond the traditional learning behaviors and legacy content to cater to the current needs and behavior of the workforce. Our research shows that eLearning methods such as self-paced eLearning (42%) and informal online learning (38%) are almost on par with the more traditional approaches to learning, such as face-to-face learning in classrooms (50%) and on-the-job learning (47%) (Figure 1).

Our study reveals key trends in the enterprise learning space:

- › **Online learning has broad-based adoption across industries.** HR and L&D leaders in North America across industries said that 46% of their learning content for their employees is online digital learning. Technology-intensive industries such as IT and high tech (58%) and banking and financial services (52%) lead the pack, while industries such as healthcare and life sciences (41%) and manufacturing (39%) have the lowest penetration.

FIGURE 1
eLearning Approach Adoption Is Gaining Ground On The More Traditional Approaches



Base: 161 HR and learning and development leaders across organizations in the US and Canada

Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, December 2016

› **Organizations customize their learning content.**

Nearly half (49%) of the eLearning content is created internally. L&D leaders across organizations mandate their instructional designers to customize to the unique learning needs of their organization. This holds true across company sizes and industries, highlighting the need to update learning approaches to meet rising customer expectations and technology trends.

› **Mobile is an effective tool to drive the learning content.**

Sixty-two percent of respondents to our survey are convinced about the effectiveness of learning content on mobile devices. Twenty-eight percent of respondents said that mobile is a valued and effective way of learning, and they want to have more mobile content. Seventeen percent said that mobile is an effective tool for short learning content and for providing learning content on the go (see Figure 2). Mobile content also received a thumbs up from content developers — when asked about instructional designers' attitude toward mobile learning, 74% of learning and development leaders agreed with their instructional designers that mobile has tremendous

potential to increase employee involvement in learning, while 75% mentioned that mobile is a good learning tool for some content.

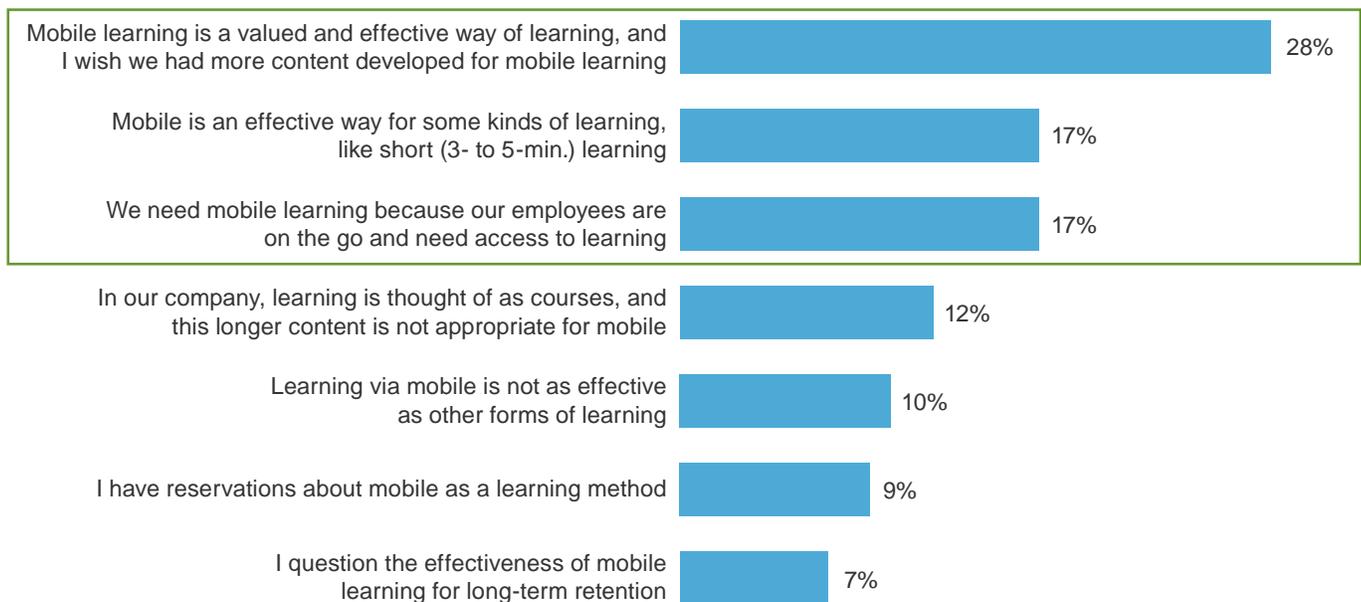
The Current Approach To Learning Is Not Adequately Addressing Your Employees' Needs

In the age of the customer, every business you work with will need to compete on customer experience (CX) and delivering on constantly rising customer expectations. Seventy-six percent of global execs tell us that improving CX is a high or critical priority. In order to achieve the required outcome from corporate learning initiatives, Forrester has identified the ability to groom the right talent as one of the six most critical levers of customer-obsessed organizations. It is more important than ever for organizations to enable their workforce and nurture talent through enterprise learning by using the right tools suited to employee needs and behavior.⁵

FIGURE 2

Learning Leaders Want To Drive More Mobile Learning Content

“As a leader in your organization, which of the following best describes the use of mobile for learning?”



Base: 161 HR and learning and development leaders across organizations in the US and Canada

Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, December 2016

“People will not do long learning sessions because of culture today. We need to meet learners where they are, and our learners are not at one place. They will do everything on a mobile device.”

— Global lead for learning and development, global financial services major

Are organizations doing enough to enable their workforce in their moments of need? Probably not. You can't ignore Millennials in creating a corporate learning strategy. Millennials form a defining share of the workforce in the US, and they have some unique characteristics that inform the ways in which they learn. These workers grew up with technology gadgets, and from an early age — long before they entered the workforce — they've been using these devices to socialize, collaborate, and find the information they need. Leaders in today's organizations must take advantage of these attributes in their L&D programs.

In 2016, Forrester introduced the Employee Mobile Mind Shift Index (eMMSI) to analyze workforce mobile intensity, expectations, and behaviors. Insights from this index are used to determine the need and urgency to provide certain employees with mobile devices, applications, and content; what their expectations are; and which features to include. The most significant finding from our eMMSI model is perhaps the scores of workforce expectations versus organizational delivery on mobile technology. Global

average workforce scores were extremely low at – 0.17 (scores less than – 0.15 indicate significant friction, where workers' expectations are far greater than the organizational delivery of mobile technology). Furthermore, in the US, a higher percentage of firms fall under the category of a disconnected workforce (34% for the US workforce versus 28% for the rest of the world) (see Figure 11 — Appendix).⁶

We asked learning leaders about their approach toward corporate learning across industries in the US and Canada, which resulted in some important findings:

› **Adoption of mobile devices for eLearning will see high growth.** eLearning content for mobile devices is set to see high growth across industries in the US and Canada. Respondents to our survey said that their organizations will see an accessibility of 31% (tablets) and 27% (mobile) for the next 12 months, compared with 25% (tablets) and 21% (mobile) in the previous 12 months. This is a growth of 24% and 26% for tablets and mobile devices, respectively (see Figure 3). This trend is further bolstered by the needs of Millennials in organizations. Fifty-five percent of survey respondents believe that Millennials want to access learning wherever they are, and 47% said that Millennials want to leverage new technologies for learning. Further, 45% said that Millennials want to access both internal and external content from anywhere. .

› **Flexibility and accessibility will drive mobile learning.**

FIGURE 3

eLearning Content Targeting Mobile Devices Is Expected To See High Growth Across Industries

“What percentage of your eLearning is (in the past 12 months) or will be (in the next 12 months) accessible on the following device types?”



Base: 161 HR and learning and development leaders across organizations in the US and Canada

Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, December 2016

Respondents to our survey clearly highlighted the benefits of mobile learning for their organizations. Fifty-three percent mentioned flexibility, while ease of sharing content (47%) and accessibility (45%) were the other top choices (see Figure 4).

Firms Must Overcome Challenges In Mobile Learning To Have A Successful Learning And Development Strategy

Learning and performance tools used to be primarily viewed through the lens of training and compliance. But now, some of the best companies offer learning experiences that go well beyond compliance training. Instead, they offer a blend of engaging formats that challenge and extend employees' depth and breadth of knowledge. They achieve this by integrating learning and performance management seamlessly into the employee experience. As a result, employee performance has become a continuous process with frequent formal and informal check-ins, adoption of new technologies, and new device content.

Learning and development departments clearly see the

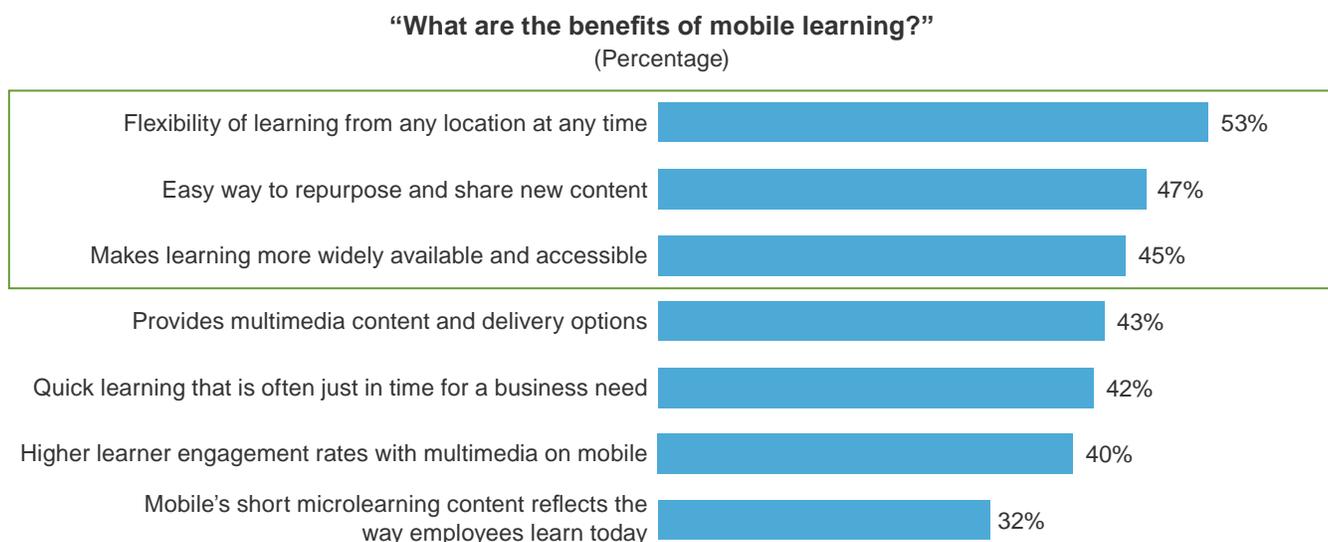
benefits of mobile learning, resulting in high growth of mobile learning adoption. However, many organizations still struggle to implement mobile learning, even as they recognize the pressure is on to provide content in mobile-ready formats. This struggle is a result of traditional learning behaviors, legacy learning content, lack of financial resources, and outdated technology.⁷

In our research, we identified the following challenges companies face in implementing mobile learning in their organizations:

- › **Selecting a feature-rich mobile learning tool is the biggest challenge.** Organizations face a unique challenge of identifying a feature-rich mobile authoring tool that can help instructional designers to develop mobile learning content with ease, as noted by 50% of the survey respondents. Another big challenge is to skill the instructional designers on mobile content authoring tool usage (38%) (see Figure 5).
- › **Educating the employees on the benefits of online and mobile learning is difficult.** Forty-one percent of the HR and L&D leaders we surveyed face challenges in marketing the eLearning courses to their workforce (see Figure 5).
- › **Setting up a mobile learning program is a technical**

FIGURE 4

Mobile Learning Provides Flexibility, Ease Of Use, And Better Access To Consumers



Base: 161 HR and learning and development leaders across organizations in the US and Canada

Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, December 2016

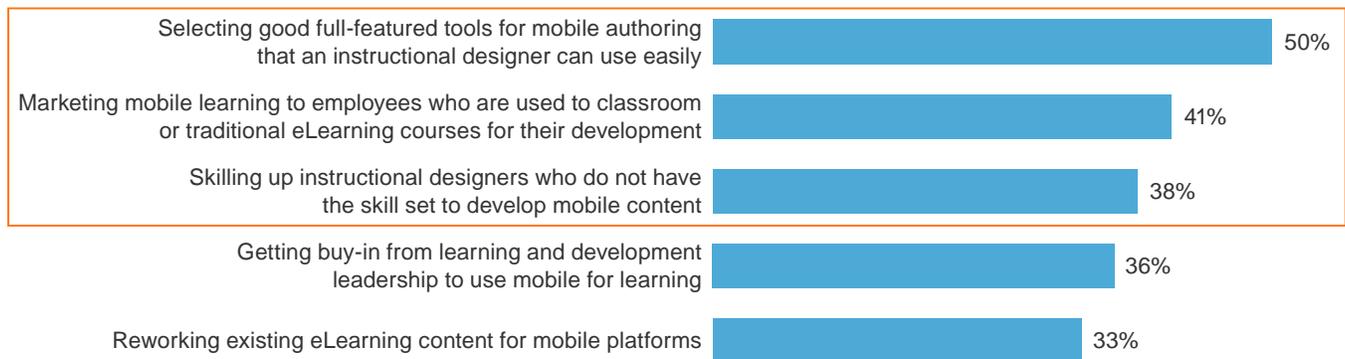
challenge. Fifty-five percent of our survey respondents mentioned that setting up of a mobile program is a top technical challenge they face. This includes setting up infrastructure, buying authoring tools, training instructional designers, and providing mobile devices if that is company policy.

- › **Security remains a concern for mobile learning.** There is a need for more secure mobile learning platforms to alleviate some of the security concerns — 47% of the survey respondents indicated their IT department perceives security risks through mobile devices.

order to enable digital learning content, organizations must consider content to be multidevice friendly, including mobile devices and tablets. Mobile authoring tools must be innovative and adept in easily creating responsive, mobile-friendly courses. Respondents to our survey said that online learning content for employee development programs needs to have several features, such as device versatility (80%), ease of access (80%), shorter content pieces (76%), and higher engagement to ensure higher completion rates (74%) (see Figure 6).

FIGURE 5
Developing Mobile Learning Content Has Several Challenges

“What are the biggest challenges in developing online content for a mobile device?”
(Percentage)



Base: 161 HR and learning and development leaders across organizations in the US and Canada

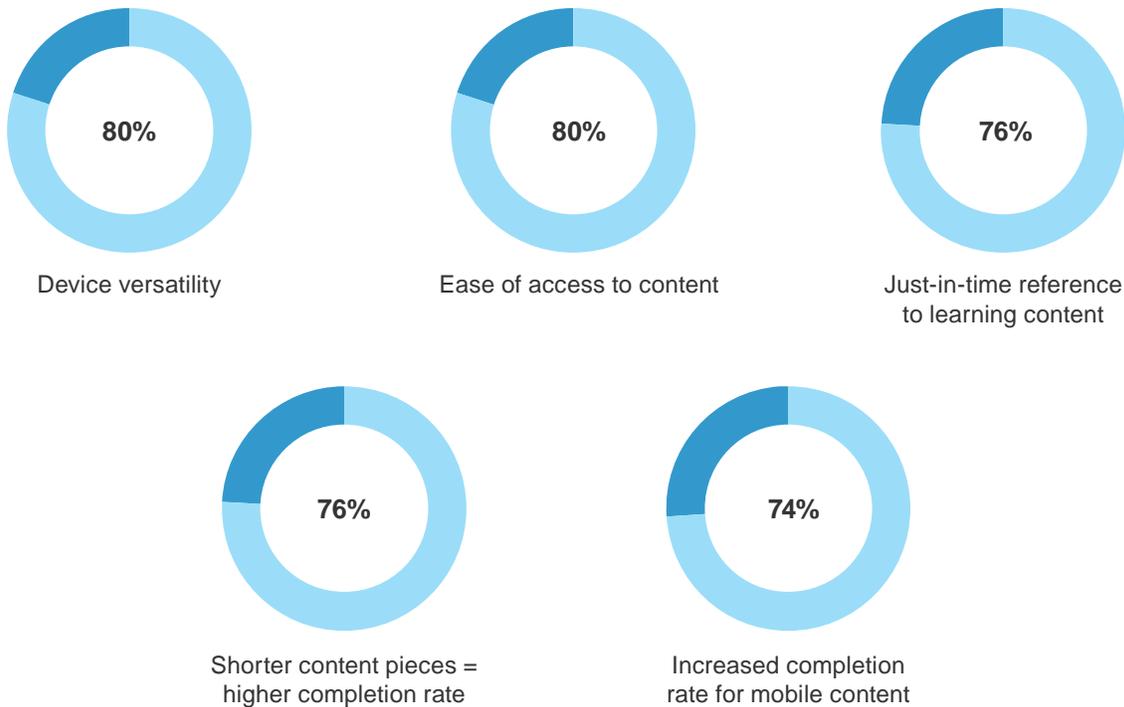
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, December 2016

A Feature-Rich Mobile Learning Platform Will Guide You Toward Success

Learning tools will increasingly exhibit a consumer-like, easy-to-use interface with strong search capabilities. In

FIGURE 6
Organizations Demand Feature-Rich Mobile Learning Tools

“How important are each of the following in terms of encouraging your company to use more online digital learning in employee development programs?”
(Percentages showing “important” and “very important”)



Base: 161 HR and learning and development leaders across organizations in the US and Canada

Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, December 2016

The need for a feature-rich content authoring platform that targets mobile devices is clear. Almost one-third (32%) of respondents across industries highlight the need for mobile learning. To add to this, 29% of respondents plan to develop some learning content targeting mobile devices, while 23% want to develop all new content that is mobile enabled where possible (see Figure 7). Only 8% of the respondents we interviewed either have no plans for developing mobile learning content in the future or do not have clarity on their strategy.

“We need to reframe people’s thinking about learning. People keep a very traditional view; even though they are doing more bite-sized learning, they don’t realize it. This is why the new content that we create needs to be mobile. We need to meet learners where they are, and our learners are not at a single place.”

— Global lead for learning and development, large global insurance provider

From Forrester inquiries and interactions with clients, we found that about three-quarters of organizations are now using some form of eLearning. But it's not as easy as selecting and implementing a single technology. The key to success is selecting the right technology for the type of learning content you are presenting. This includes powerful mobile learning content authoring tools as well as learning platforms for content consumption.⁸

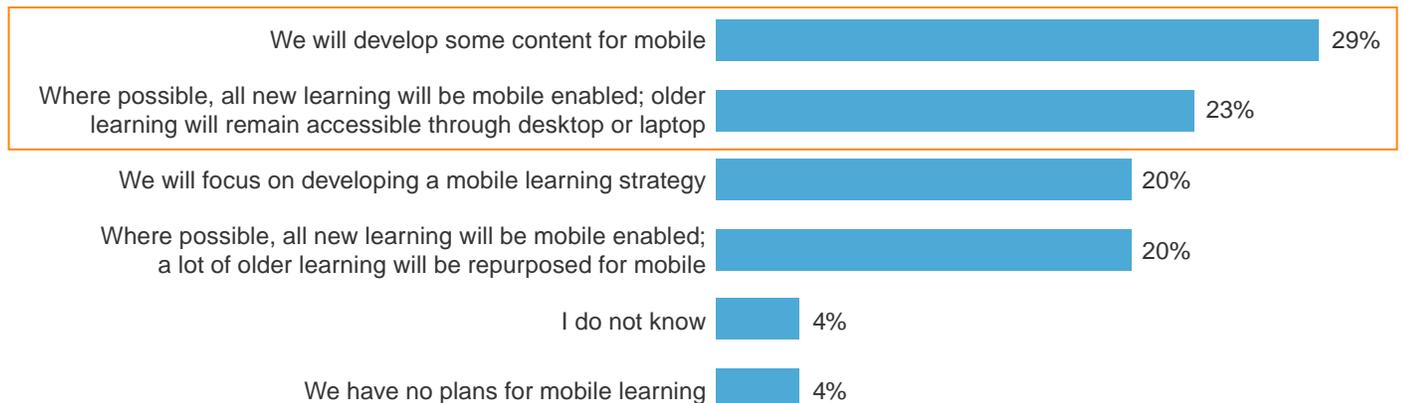
The challenge many of our clients face is one of sorting through the options. With the increasing number of learning choices available to your organization, it becomes critical that you apply the right learning format, at the right time, for the right learning need. This will vary with the audience — employees need in-depth product learning, while channel partners need a good understanding of the product's selling strengths, and customers need to understand the variety of ways they can use the product. The objective is to provide short, engaging, rich content that your employees can use with flexibility.

As learning becomes less formal and the lines blur between information and learning, mobile plays an increasing role in giving employees the information and learning they need, when they need it, to do their job. Mobile increases productivity and also allows for faster and better communication.

We still face work environments where “learning” is viewed as an experience requiring employees to stop their work and go to a “class,” either online or face to face. While some content is appropriate for this more formal learning, today's employees — especially Millennials — value the approach of chucking this content into single-concept, 5-minute learning segments available to them anytime, anywhere, and on any device.

FIGURE 7
Learning In The Future Will Be Mobile Enabled

“What are your future plans for mobile learning?”
(Select one)



Base: 161 HR and learning and development leaders across organizations in the US and Canada

Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, December 2016

Key Recommendations

For effective introduction and use of mobile learning in your organization, do the following:

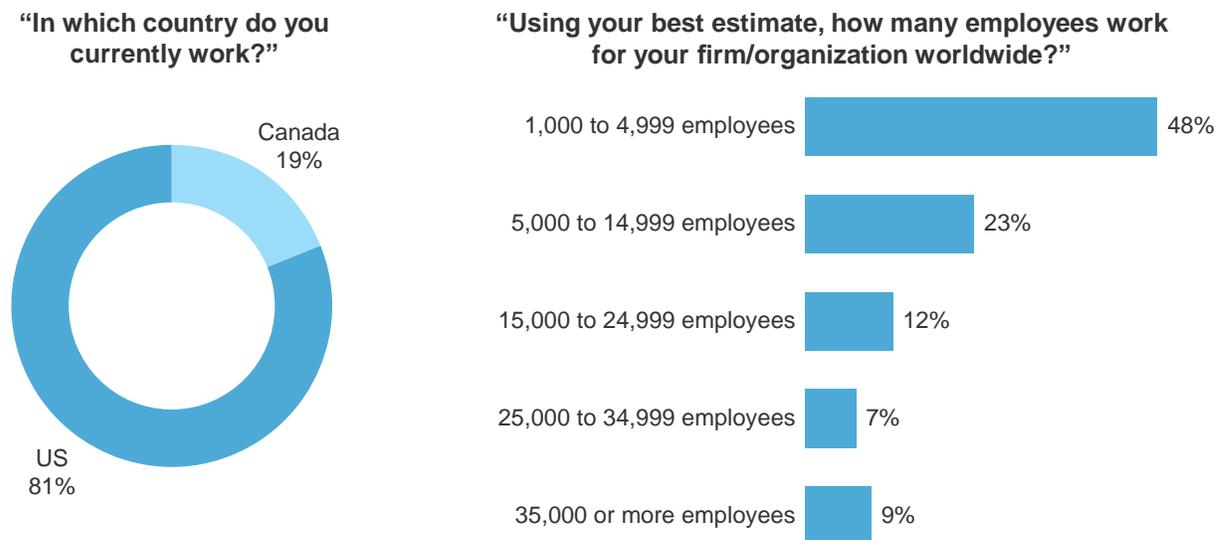
- › **Make a business case for mobile learning.** Secure support from leadership in many lines of business (LOBs) by showing data on the need for, value of, and effectiveness of mobile learning across the organization. Detail the cost for acquiring an authoring tool, training content developers on feature use, and promoting and supporting mobile learning with employees.
- › **Form a committee to develop a mobile learning strategy.** Gather representatives from IT, HR, and all LOBs to develop plans for effective use of mobile in the organization. This includes platform availability, security, engaging content both new and repurposed, internal promotion, integration with social media, learning management systems (LMSes), analytics, performance support, and a feedback mechanism for suggestions and improvements.
- › **Choose the right mobile learning tool.** Think about the mobile features that users love and use daily, such as video and the ability to share content with someone who can benefit. Make sure the tool features allow content designers to create a variety of engaging content. Get demos from the top providers.
- › **Start small and grow with user feedback.** Choose a group to pilot mobile learning that has super users, sometime-mobile users, and even some naysayers on using mobile for learning. Solicit feedback, make changes, and bring on additional groups as instructional designers/content developers create learning content.

Appendix A: Methodology

In this study, Forrester conducted an online survey of 161 HR and L&D leaders in the US to evaluate some of the key challenges, drivers, and trends that businesses are facing in regards to corporate learning. Survey participants included decision makers and business leaders in business or IT roles. The study both began and was completed in December 2016.

Appendix B: Supplementary Graphs And Demographics

FIGURE 8
Organizational Structure — Country And Employee size

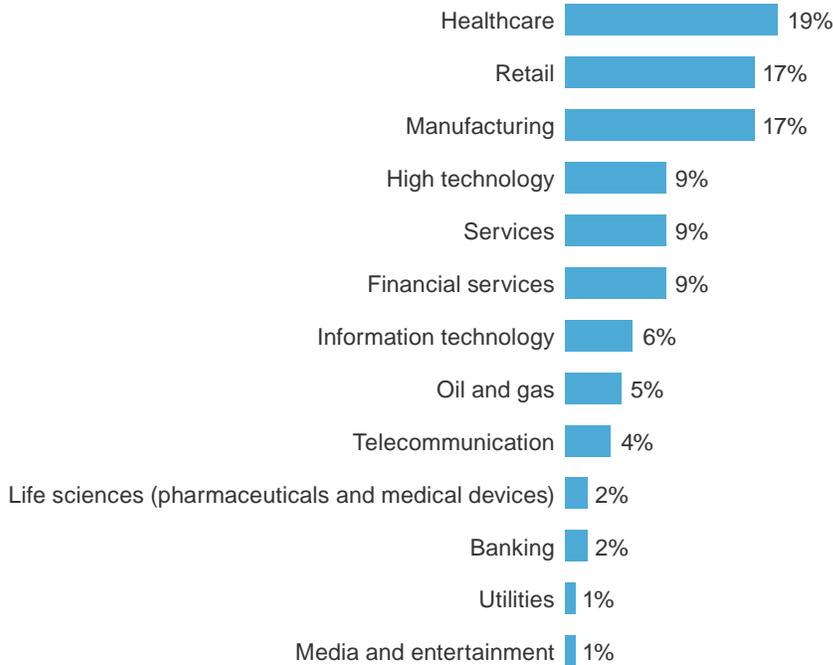


Base: 161 HR and learning and development leaders across organizations in the US and Canada
(percentages may not total 100 because of rounding)

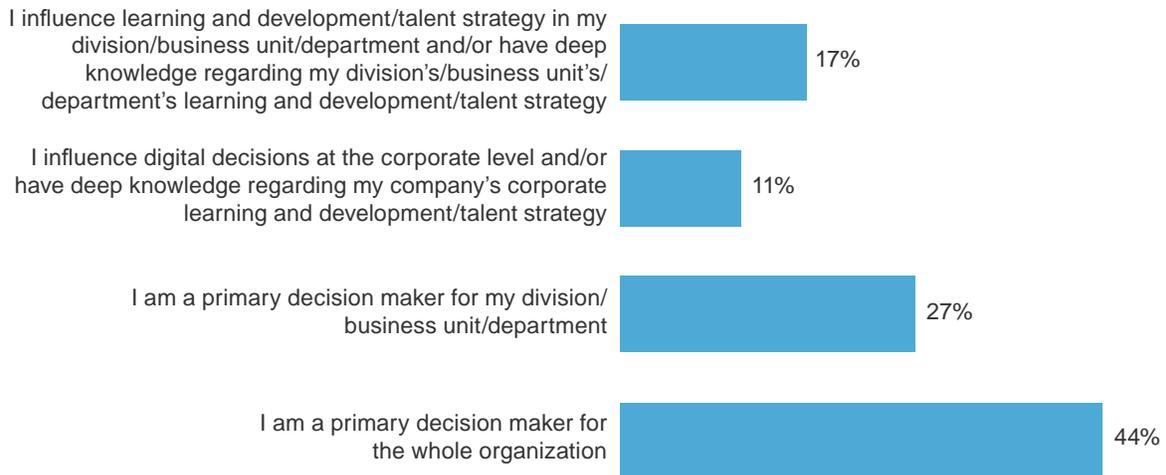
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, December 2016

FIGURE 9
Demographics — Industry And Responsibility

“Which of the following best describes the industry to which your company belongs?”



“What is your level of responsibility for decisions regarding learning and development/talent management in your organization?”

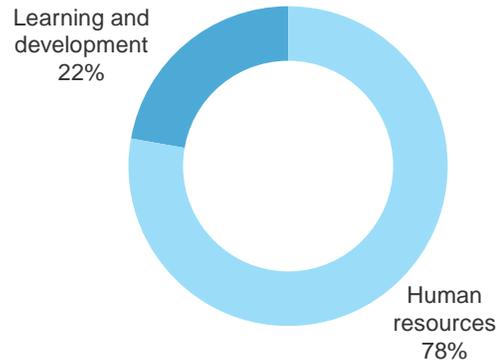


Base: 161 HR and learning and development leaders across organizations in the US and Canada
 (percentages may not total 100 because of rounding)

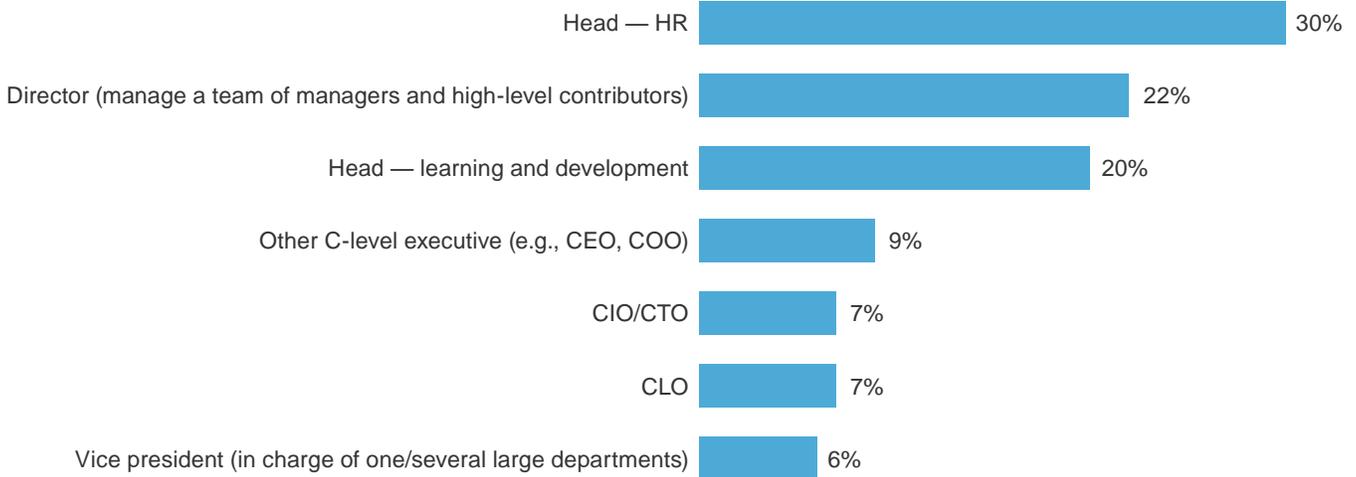
Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, December 2016

FIGURE 10
Demographics — Department And Title

“Which of the following best describes your current position/department?”



“Which title best describes your position at your organization?”



Base: 161 HR and learning and development leaders across organizations in the US and Canada
 (percentages may not total 100 because of rounding)

Source: A commissioned study conducted by Forrester Consulting on behalf of Adobe, December 2016

FIGURE 11
Employee Mobile Intensity Segments (eMMSI model)

	All	Disconnected	Unshifted	Transitional	Shifted
Mobile Intensity Score range*	0 to 100	0	>0 to 19	20 to 59	60 to 100
	All	eMMSI scores			
Average Mobile Expectation Score	-0.17	-0.24	-0.17	-0.15	-0.08
Average Communicate Score	34	4	31	46	63
Average Consume Score	27	2	22	35	55
Average Transact Score	22	1	17	27	49
Average Personal Intensity Score	36	28	23	38	58
	All	Demographics			
% of workforce		30%	13%	39%	17%
% of US workforce		34%	15%	39%	13%
% of non-US workforce		28%	13%	40%	19%
	All	Usage			
% using a smartphone for work	65%	13%	75%	89%	93%
% using a tablet for work	22%	2%	21%	24%	52%
% using a laptop for work	84%	97%	74%	79%	84%
Number of phone apps	8	<1	7	11	15
Number of tablet apps	4	<1	2	3	9
% practicing BYOD	23%	15%	20%	27%	33%

Base: 968 to 2,859 global information workers in the specified mobility segments

Source: Forrester Data Global Business Technographics® Mobility And Workforce Survey, 2015

Appendix C: Endnotes

¹ Source: “Mobile Is Ubiquitous Today — But Why Not For Learning?” Forrester Research, Inc., October 13, 2015.

² Source: Richard Fry, “Millennials surpass Gen Xers as the largest generation in U.S. labor force,” Pew Research Center, May 11, 2015 (<http://www.pewresearch.org/fact-tank/2015/05/11/millennials-surpass-gen-xers-as-the-largest-generation-in-u-s-labor-force/>).

³ Source: “Updating Learning For The Next-Generation Workforce,” Forrester Research, Inc., May 4, 2016.

⁴ Source: “Empower Your Employees In Their Mobile Moments,” Forrester Research, Inc., August 1, 2016.

⁵ Source: “The Forrester Wave™: Learning And Performance Management, Q4 2016,” Forrester Research, Inc., December 2, 2016.

⁶ Source: “The State Of Enterprise Worker Mobility, 2016,” Forrester Research, Inc., April 21, 2016.

⁷ Source: “Mobile Is Ubiquitous Today — But Why Not For Learning?” Forrester Research, Inc., October 13, 2015.

⁸ Source: “Learning Technologies Engage Employees, Customers, And Channel Partners,” Forrester Research, Inc., September 10, 2014.