elementrix
REIMAGINE LEARNING

a digital learning partner of:

TACK
TMI
a GI GROUP brand

ELEMENTRIX DIGITAL LEARNING IN ASIA

Bridging The Gap

2018

MALAYSIA & SINGAPORE

EXECUTIVE SUMMARY

In association with:

MIHRM

BFM-EDGE B SCHOOL

RCA
COACHING | CONSULTING

hrmasia

smartup

CONTENTS

Research Methodology

- A questionnaire was developed based on our industry and content knowledge

- Questions were targeted to address the information objectives with Professor Keith Houghton, Chief Academic Strategist, Research Coaching Australia, providing expert advice

- The questionnaire was designed to be easy to complete – within 10 minutes. It was pilot-tested among respondents that mirrored the target population from and was subsequently following the feedback received

- The survey was administered through the Survey Gizmo research platform for three weeks in July 2018. The data was analysed by Professor Houghton using statistical analysis techniques including both descriptive and univariate analysis

- Respondents in Malaysia were drawn from the databases of the Malaysian Institute of Human Resources Management (MIHRM), the BFM-Edge B School, Elementrix and TACK TMI. Respondents in Singapore were drawn from a relevant sub-set of the HRM Asia database. A total of fully 169 completed responses were received from Malaysia and 116 from Singapore

- After consideration, we were satisfied that the sample is generally representative of the population of interest.

WHY WE CONDUCTED THIS RESEARCH

This is ground-breaking research that specifically looks at digital learning in Malaysia and Singapore.

The speed of learning has become a source of competitive advantage

In this fast moving, digital world, learning is more critical to business success than ever before: The speed of learning has become a source of competitive advantage. The pressures of *faster, cheaper and better* are being increasingly felt within organisations.

In this context, this research report is highly relevant to senior leadership teams and to corporate learning and development (L&D) teams.

The L&D industry will undergo enormous change in the next few years. This is being driven by corporate for quicker and more effectively deployment of learning. While delivery of learning *faster, cheaper and better* may have been a dream for L&D in the past, digital technology now has the potential – if used with skill – to make this possible.

This movement very simply is: from predominantly classroom instructor-led to blended or completely digital learning. This is a world of, "anywhere, anytime" learning, with mobile phones and tablets becoming increasingly important to the learning process. If you are in L&D, you cannot help but get excited at the options that are opening up to you in the 'new world of digital learning'.

But how much of the talk is hype, and how much is reality? And how much of the talk is being converted into reality in the world of corporate L&D? While the technology side is expanding rapidly, what is happening on the human side – the L&D practitioner side and on the learner side? How quickly are organisations adopting digital learning?

We searched for data to answer these types of questions. We could not find reliable data and any strong research in the field. This lack of knowledge was the motivation to the conduct of this research in our own markets of Malaysia and Singapore.

We are in the early stages of uptake in digital learning. The pace that organisations will want to proceed will increase rapidly over the next few years. In this regard, we will be conducting this research on a regular basis to pace the progress.

This knowledge will help the L&D industry in Malaysia and Singapore to accelerate in the new world of learning made possible by digital technology.

We hope that you are of this opinion as well.

George Aveling
Chief Re-Imagineer

elementrix

CURRENT STATE

APPLICATION OF DIGITAL IN L&D

Current application of digital in L&D is **small to moderate** in Malaysia and Singapore.

L&D PROGRAMMES WITH DIGITAL ELEMENTS

43% MALAYSIA | 44% SINGAPORE

NONE / TO A SMALL EXTENT

Almost half of the responders (43% in Malaysia) and (44% in Singapore) indicated that their **use of digital is "none or to a small extent"**

24% MALAYSIA | 33% SINGAPORE

LARGE OR GREATER THAN LARGE

24% of respondents in Malaysia and 33% of respondents in Singapore indicated that it is **"large or greater than large"**

LEARNER MOTIVATION TO ENGAGE IN DIGITAL LEARNING

80% MALAYSIA & SINGAPORE

LOW TO MEDIUM

Over 80% of respondents indicated it is **low to medium.**

TOP 4 OBJECTIVES FOR DIGITAL LEARNING

Singaporean respondents rated "higher ROI compared to conventional classroom training" as one of the top 4, while Malaysian respondents indicated that "cost savings" is a very important objective.

MALAYSIA

Enables consistency of training quality	**72**%
Suits the learning styles of the younger generations	**66**%
Cost savings	**63**%
Able to use analytics to track learner engagement	**60**%

SINGAPORE

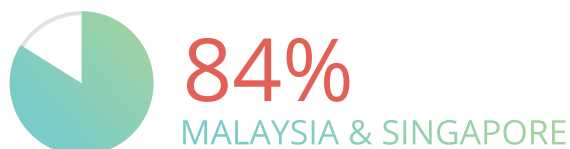|	
Enables consistency of training quality	**65**%
Able to use analytics to track learner engagement	**64**%
Suits the learning styles of the younger generations	**62**%
Higher ROI compared to traditional face-to-face training	**60**%

ASPIRATIONS

DIGITAL IS CRITICAL

84%
MALAYSIA & SINGAPORE

respondents in both Malaysia and Singapore agree that incorporating digital into L&D is critical to organisational success.

MAJOR UPWARD
SHIFT

in the application of digital learning elements in Malaysia and Singapore in the next 12 months, with Singapore (52%) anticipating to move forward at faster speed than Malaysia (35%).

TRENDS IN THE SPREAD OF USAGE OF DIGITAL LEARNING ELEMENTS IN THE NEXT 12 MONTHS

Learner-engaging technologies – to increase learner motivation – anticipated to rise

"Learner-engaging technologies" i.e. those that engage the learner through active learner participation and personalisation - e.g. gamification, social learning, adaptive learning - are **experiencing higher levels of acceptance and usage.** They appear to be at "take-off stage" where they are accepted parts of organisational digital learning eco-systems.

### Micro-learning on an upward trend

Micro-learning makes learning more digestible, leading to higher rates of consumption in the learner market.

Learning technologies with the highest growth rates

Virtual reality, augmented reality and artificial intelligence have the highest anticiipated proportionate growth rates - off a low base. Higher adoption will happen as a function of price and developments in the technology to meet the needs of the industry.

Augmented reality had the highest proportionate anticipated growth rate of all learning technologies under study.
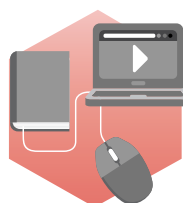
Anticipated decline or stagnation

While e-learning is expected to remain dominant as the top digital learning element in the next 12 months, the results indicate an anticipated decline in application.

3 MAJOR BARRIERS TO THE IMPLEMENTATION OF DIGITAL LEARNING

STAKEHOLDER BUY-IN

L&D COMPETENCE

TOP 3 BARRIERS

COSTS/ BUDGETARY FACTORS

The above are the main issues when implementing digital learning solutions
(in order of most frequently mentioned)
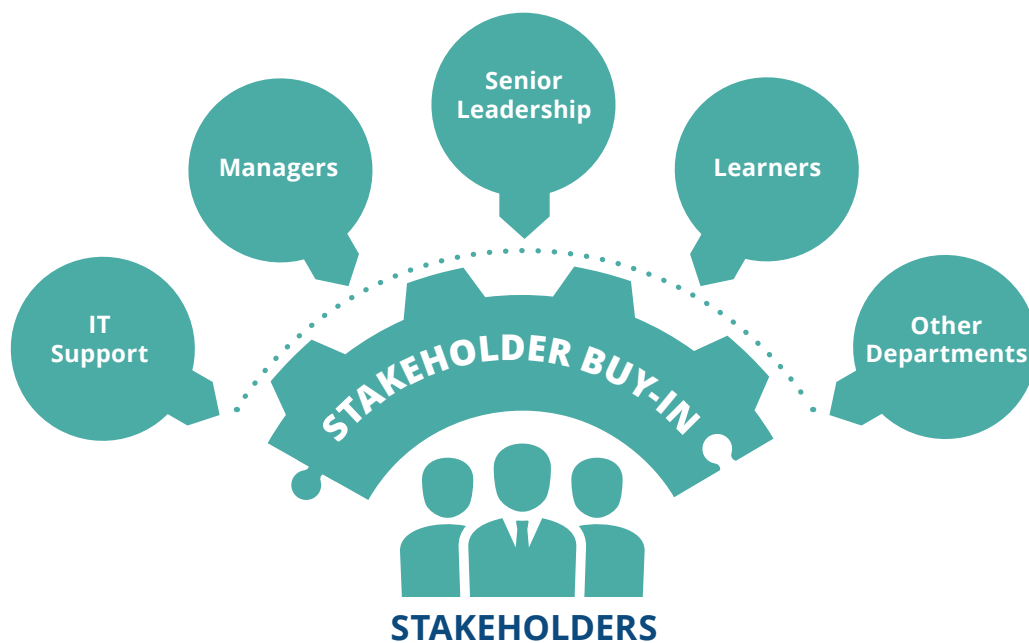
STAKEHOLDERS

The lack of stakeholder buy-in was cited highly both in Malaysia and Singapore as a barrier to the effective implementation of digital in learning. Stakeholders, in this case, include senior management, supporting functions such as IT, middle managers, and the learners themselves. The exception is in Singapore where Senior Management support is not seen to be a major barrier.

L&D competence is a major factor impeding the use of digital in learning:

- 60% of respondents indicated that there are competency gaps in the implementation of digital learning

- There is greater confidence in Singapore in the competency of L&D in implementing digital learning (42%) than in Malaysia (37%)

- Larger companies in Malaysia (those with more than 200 employees) are more positive as to the competence of their L&D teams in this area.

Despite the strong push to use digital in businesses these days, the data suggests that relatively low budgets are allocated for the use of digital in L&D:

- 62% of respondents in both countries agreed that budget limitations are a barrier to the implementation of digital learning.

- More than 30% in Malaysia and Singapore indicated that their investment in digital learning is less than 5% of the total L&D budget.

We have identified three key success factors that will enable organisations to successfully drive and embed digital learning.

These success factors are essential to ensure that L&D departments remain an influential and strong function in helping businesses gain their competitive edge.

In this respect, we have identified two important groups of people that play a crucial role in implementing digital learning – the C-Suite and Senior Leadership teams, as well as the L&D teams.

Key Success Factor 1: Senior Leadership Support

The C-Suite and Senior Leadership group is the key strategic driver in shaping strategy and enabling resources in the adoption of digital in every aspect of business. They are the ones who will determine how well and how fast digital is adopted in L&D.

There are two calls to action for CEOs and senior leadership teams in this regard:

❶ Visionary leadership:
Lead with speed in the digital age

In *traditional, stable environments,* resource allocation decisions are based on conventional evidence-based ROI business cases.

In an *uncertain environment,* a different paradigm of decision-making is required. This paradigm will have to be based on a vision for the future, rather than on conventional backward-looking ROI-based justifications which cannot be provided. These businesses will be innovative about what evidence is used to measure success.

Organisations with CEOs and senior leadership team who will take that risk and have a vision for a digitally enabled learning organisation, will develop competitive advantage through speed of learning and innovation.

Other companies that insist on evidence-based business cases will be hampered and fall behind in the digital learning race.

❷ Upskill in the digital world

Our experience is that many senior leadership teams are:

- Hungry to know more
- Confused or perplexed, at times intimidated, by the language, ways of thinking and possibilities that the digital world creates
- Uncertain of where to start and how to lead in a digital world.

The knowledge gap needs to be closed so that leadership teams can lead their organisations confidently in the digital world.

In the context of this study, this will flow through to the creation of competitive advantage through learning.

Key Success Factor 2: Adoption of New Mindsets and Competencies in L&D teams

To thrive in the age of digital learning, L&D departments, L&D Heads and corporate L&D professionals will need to undergo a transformation in terms of competencies (knowledge, skills and mindsets) and structure.

From the research, we have identified three calls to action in terms of transformation for L&D departments.

These involve creating new roles within the department as below:

① Learning Experience Designers

In order to motivate learners with engaging and relevant content in a digital world, L&D needs to be much more human-centred than ever before. And, it needs to understand how to engage learners in the new learning eco-system in a digital world.

There are now a wide range of on-line and off-line learning options available to learning practitioners, including mobile learning, social learning, adaptive learning, MOOCs, video content, podcasts, internal expert webinars, analytics and more.

The challenge is to harmonise those options into coherent, engaging and relevant learning experiences and learning journeys, both on-line and off-line (e.g. classroom, coaching) that meet business needs.

② Learning Technology Specialists

There needs to be competencies in the L&D teams to test, select and incorporate digital technology into learning design as well as extract, read and understand analytics to further make the learning more engaging.

While this need can be partly met by consultants and vendors, it is important that L&D develops a technical competency to enable it to trial and implement the selected technologies effectively.

③ Learning Experience Promoters

In the world of digital learning, the decision on whether to engage with the learning lies with the learner. L&D is competing with the many demands on the time, priorities and motivations of learners. Therefore, it must become adept at promotion of the learning offering, focusing on answering "What's in it for me" for learners.

Key Success Factor 3: Strengthening the L&D Stakeholder Map

The research indicated that ineffective stakeholder buy-in is a key barrier to successful implementation of digital learning in the workplace. Stakeholders include managers and support departments e.g. IT.

L&D needs to amplify its efforts to build stakeholder relationships and business partnerships that deliver real value to the organisation.

There are two calls to action for L&D in this regard:

① Develop new partnerships with the support functions

This will require that L&D work with these support departments to form a common vision, common objectives and a way of working to support each other's objectives. For example, L&D will need the support from other departments, such as IT and Commmunications/Marketing.

② Be a stronger business partner with the business functions

Human-centred design processes can greatly assist the business in achieving its targets faster, cheaper and better. For example, through faster deployment of sales training on new product releases; teaching the business how to use technology for more cost-effective communications; building competency in the business on how to share information effectively using learning

Technology has caused huge disruptions in business and in the way we live our lives. And L&D teams are operating in this new world that is a completely different place now than it was even just three years ago.

In this world, learning is more than ever before, integral to business success. The pressures of faster, cheaper and better are being increasingly felt within organisations.

The opportunity at an organisational level in terms of digital learning adoption is to:
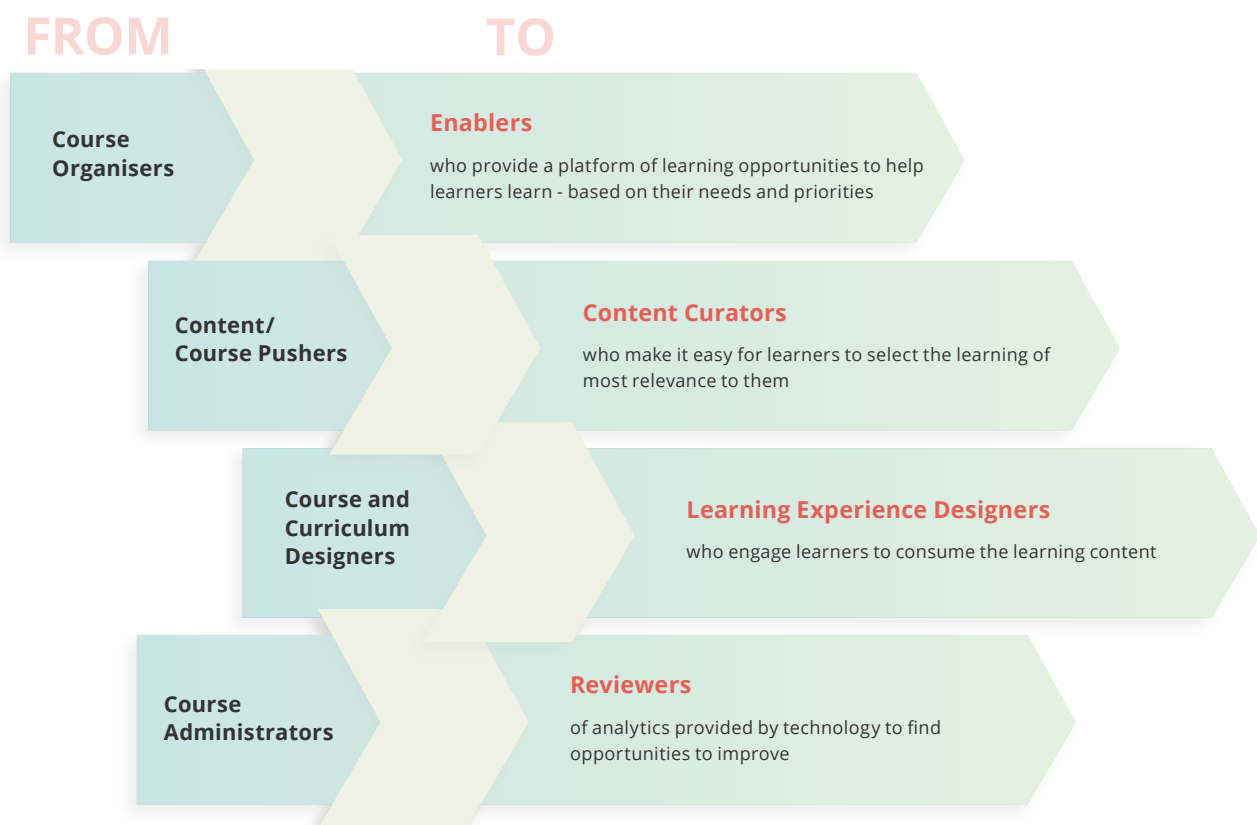
◉ Lead with vision

◉ Provide resources

◉ Create competitive advantage through the speed of learning.

Meanwhile, L&D teams are operating in this new world that is a completely different place now than it was even just three years ago.

The opportunities for L&D teams in the world of digital learning are to:

◉ Adopt new mindsets and skills in a world where learners often have the choice of whether to engage or not engage with the learning

◉ Increase learner motivation to achieve real business results

◉ Become strong, value-adding business partners to the business to meet its challenges and objectives, beyond what has been possible in the past.

And just as the world has transformed, L&D teams must also transform the way they work. This transformation is outlined in the diagram below:

FROM   TO

Course Organisers

Enablers
who provide a platform of learning opportunities to help learners learn - based on their needs and priorities

Content/ Course Pushers

Content Curators
who make it easy for learners to select the learning of most relevance to them

Course and Curriculum Designers

Learning Experience Designers
who engage learners to consume the learning content

Course Administrators

Reviewers
of analytics provided by technology to find opportunities to improve

WHO'S BEHIND THE RESEARCH

elementrix

Elementrix is an award-winning digital learning and solutions company based in Kuala Lumpur.

We are passionate about helping companies to reimagine and create innovative, refreshing and exciting learning experiences for their people and customers in the digital age.

MIHRM

The Malaysian Institute of Human Resource Management (MIHRM) was established in 1976 as Malaysia's first professional body promoting the practice of Human Resource Management. It has trained more than 20,000 competent HR professionals and practitioners in both the private and public sectors.

TACK TMI
a GI GROUP brand

Elementrix is a digital learning partner to TMI Consultancy Sdn. Bhd., a respected, innovative and award-winning training and consultancy company that represents TACK International and TMI, two of the world's largest learning and people development companies. TACK TMI has one of the widest ranges of company-developed training programmes in Asia, spanning the areas of Customer Experience, Culture Change, Leadership, Sales, Personal Development and Performance Improvement. Our programmes have been developed overseas and adapted for the Asian market.

hrmasia

HRM Asia is a multi-platform network helping to build and celebrate the professional HR community in Asia-Pacific. It provides an array of thought-leading HR discussion and information to HR professionals of all ranks across the region.

smartup

SmartUp is a mobile peer-to-peer knowledge sharing platform. Conceived and developed by a seasoned team of founders and investors behind Founders Forum, Spotify, Siri, lastminute.com and others, SmartUp is now used all around the world.

BFM-EDGE B SCHOOL

BFM-Edge B School is the corporate training and education arm of The Edge and BFM Media. Its mission: to advance Malaysia and the future of work. Areas of focus are in ABCD: Artificial Intelligence, Big Data, Culture & Communication, and Digital Transformation.

RCA COACHING | CONSULTING

Research Coaching Australia (RCA) is an Australian enterprise that supports and promotes research and researchers in the Asia-Pacific region. It has a range of clients from both institutional (including universities and research organizations) as well as individual researchers and research teams.

elementrix

R E I M A G I N E   L E A R N I N G

a digital learning partner of

TACK▽
⚬TMI

a **GI GROUP** brand