Deloitte's Flash Learning Mobile App Results in Less Time Out of Market

Deloitte
Best Advance in Compliance Training
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Company Background

Headquarters	New York, NY
Year Founded	1845
Revenue	$18.6 billion (FY17)
Employees	85,000 (FY17)
Global Scale (Regions you operate in or provide services to)	US
Customers/Output, etc. (Key customers and services offered)	Deloitte provides audit, consulting, tax and advisory services to many of the world's most admired brands, including more than 85 percent of the Fortune 500 and more than 6,000 private and middle market companies. Its people work across more than 20 industry sectors striving to make an impact that matters — delivering measurable and lasting results that help reinforce public trust in its capital markets, inspire clients to see challenges as opportunities to transform and thrive and help lead the way toward a stronger economy and a healthy society..
Industry	Professional services
Stock Symbol	NA
Website	https://www2.deloitte.com/us/en.html

Budget and Timeframe

Budget and Timeframe	$200,000 and six months.
Overall budget	Budget information is not available as of this writing.
Number of (HR, Learning, Talent) employees involved with the implementation?	The project was led by the federal talent development leader and various direct reports/development managers. The project was sponsored and overseen by both federal's chief learning officer and chief talent director.
Number of Operations or Subject Matter Expert employees involved with the implementation?	Deloitte engaged several dozen business leaders, supporting leads and subject matter experts across various channels throughout the project (i.e., compliance, risk, finance, security, IT, procurement, etc.)
Number of contractors involved with implementation	The app's developer (a third-party contractor) had a team of six to eight professionals supporting the project at any given time.
Timeframe to implement	6 months
Start date of the program	March 1, 2017

Business Conditions and Business Needs

Government contracting is a highly regulated industry and Deloitte's federal practice must comply with all "requirements" necessary to serve federal clients. These requirements range from laws and regulations (published and monitored by the federal government) to internal policies and procedures (published and monitored by Deloitte).

In this environment, Deloitte's federal talent development team has been continuously challenged to find innovative and time efficient ways to simultaneously achieve the following business and performance objectives:

1. **Comply with Government requirements**: Holistically satisfy all federally mandated annual learning requirements.

2. **Minimize business disruption:** Lower time out of market needed to access and complete the learning.

3. **Drive performance**: Foster the knowledge, skill and behavior needed to comply with laws and regulations, as well as policies and procedures.

4. **Make it easy to use, and fun**: Deploy a standardized and engaging platform for all topics. Provide "just in time" access to content at the point of need.

In early 2016, grounded by these objectives, federal talent development set about to radically transform federal's annual compliance education model.

Prior to 2016, annual federal compliance training was delivered via traditional eLearning courses. One or more (non-standardized) courses had been created for each subject and were required of all federal professionals annually, as well as new hires within their first 30 days. At one point, there were nine required courses averaging one hour each.

Learner feedback consistently noted that these courses needed to be standardized and simplified, as well as enable continuous on the job reference to key information.

With this in mind, federal talent development drove an effort in 2016 to retire all existing annual eLearnings and replace them with standardized "assessments." These assessments consisted only of scenario-based questions related to the required subject matter. To complement the assessments and support learners new to the practice or requiring a refresh, an (optional) PDF study guide was provided.

While the conversion to assessments addressed some of the objectives above around uniformity and simplicity (and drew praise and recognition from the practice accordingly), federal talent development knew the model could be still be improved and sought to continue the transformation journey in 2017.

Overview

Seeking to build on the impact of the 2016 assessment launch, federal talent development began to explore ways in which the federal compliance education model could be further transformed. In doing this, the team evaluated the current state and asked a series of simple questions around the content's accessibility, content structure, and assessment design:

- Accessibility:

    o **2016 Model**: Learners had to access the assessment questions via their Deloitte desk/laptop within the learning management system. In most cases, this required a dedicated investment of time over one or more sittings — time which was sometimes difficult for hyper-busy, on-the-go, client-serving professionals to find.

- o **2017 Goal**: What platform could be used to "meet the learners where they are" and enable access to this information via other tools?

- Content Structure:

  - o **2016 Model**: Existing learning content had been taken from all the legacy eLearnings and converted into (a very lengthy) PDF study guide. Though the study guide was well organized, its length sometimes made it difficult for learners to parcel down the content into what was most relevant — especially for the assessments and their on-the-job performance.

  - o **2017 Goal**: How does Deloitte rationalize and re-organize the content so that the learner clearly absorbs, retains and can continuously reference the information which is most important to their knowledge, skill and behavior needs?

- Assignment Design:

  - o **2016 Model**: Learners studied a separate PDF document (as needed), then complete the assessment. Further, learners had to complete the entire assessment before they see their final score and only then were told which questions were answered correctly/incorrectly. Lastly, if a learner did not pass, they had to complete the entire assessment over again.

  - o **2017 Goal**: How does Deloitte integrate the (rationalized) content with the questions? How does the company provide instant feedback to the learner once a question is answered? How can Deloitte better measure and track when learners demonstrate knowledge/proficiency (i.e., questions answered correctly) and drive them to focus only on the content that requires remediation (i.e., question answered incorrectly)?

The team believed that achieving the 2017 goals defined above would satisfy and/or materially improve the practice's business and performance objectives — notably fostering the necessary knowledge, skill and behavior while simultaneously minimizing time out of market.

Design and Deployment of the Program

After exploring several potential solutions, the team selected an established performance support app to leverage for the 2017 assessments.

The app was selected as its inherent design was very simple, but also very powerful. Specifically:

- Content is organized into flash cards. Cards contain a front and a back.

- The card front contains summary information (one or two bullets) and the back contains additional detail, as well as links to external resources (videos, websites, documents, etc.).

- Cards are organized into decks by subject and the learner can easily navigate in/out of decks, as well as swipe (left or right) to view cards.

- Additional features included the ability to "favorite" certain cards, as well as create user customized decks (containing cards from various other decks).

While the baseline design served as a great foundation, extensive customization of the app would be needed to achieve all the goals the team defined.

As such, the federal talent development team initiated a project to rapidly prototype an enhanced app design and deployment model. The was done in collaboration with federal business leadership, federal compliance and risk, Deloitte IT/mobile team and the third-party vendor.

The new/custom prototype sought to address each of the goals around accessibility, content structure and assessment design as follows:

- **Accessibility**: "Meet the learners where they are" and enable access via a mobile device. The app's inherent design is mobile first and the app (and corresponding content) can be accessed anytime/anywhere via a professional's Deloitte-issued mobile device.

- **Content Structure**: "Rationalize/re-organize the content so learners can absorb, retain, and continuously reference what is most important." The app's inherent design enables learners to quickly process key information (via the card fronts), as well as save and store cards in a tailored way for future reference.

- **Assessment Design**: "Integrate the content with the questions. Provide instant feedback to the learner once a question is answered. Reward learners once they demonstration knowledge/proficiency." The assessment design within the app is where the vast majority of customization and prototyping was needed to address the team's goals. This is specified below.

Assessment design: The app had the ability to create knowledge checks, however, questions had never been packaged in tandem with the content (flash cards). Following several months of intense design, testing and reviews, the team achieved a functioning design as follows:

- **Standardized Decks by Topic**: Separate decks were created in the app for each Assessment topic: (1) federal time and expense; (2) federal ethics and proper practices; and (3) federal security.

- **Cards and Questions Were Integrated**: Each deck contained content (flash cards) and assessment questions. However, rather than putting these in sequence (all cards then all questions), the cards and questions were integrated, meaning a learner had the opportunity to review one or more cards then answer the corresponding question(s). This met a key goal of parceling the content down (to what is most important) and then immediately testing as to whether the learner absorbed/retained the information via the question.

- **Cards Also Are Optional**: The custom design allowed learners to hide all content cards and only see the questions if desired. This feature was greatly appreciated by tenured professionals in the practice who already possessed extensive knowledge of the subject matter.

- **Instant Feedback**: When completing assessment questions, learners are immediately shown whether a question was answered correctly/incorrectly. As questions are displayed via virtual cards, learners can swipe left/right to see previous or future questions and questions can also be answered in any sequence.

- **Credit for Correct Answers/Remediation for Incorrect Answers**: Once a question is correctly answered, the learner never has to answer that question again. If a learner does not receive a passing assessment score, they are given credit for correct answers (as a percentage toward their final score) and only required to answer (a variant) of the questions answered incorrectly. Second and subsequent attempts to answer incorrect questions is referred to as "remediation."

Example:

- An assessment has 10 questions and 80% correct is needed to pass.

- The learner receives a 50% at first attempt.

- The five questions answered correctly (50%) are credited.

- In remediation, the learner receives a variant of the 5 questions answered incorrectly.*

- The learner must answer three of those questions correctly to pass (i.e., the remaining 30% + established 50% = 80%).

- The remediation model continues until a passing score is achieved and submitted.

Note: In remediation, the content cards cannot be hidden so learners are nudged to (re)read the content prior to attempting to answer the question again.

- **Even If You Pass, You Can Still Improve a Score Less Than 100%.** In the example above, if a learner received 80% or 90%, they would be given the following options:

  o **Submit Their Score**: This closes the assessment and issues a certificate of completion (which is then stored in a "Completions Deck" within the app for quick reference/audit trail).

  o **Improve Their Score**: This takes the learner to the remediation view where the one or two incorrect questions (and cards) are displayed. The learner can continue in remediation until 100% is achieved if desired.

- **Once One Submits a Passing Score, Content Cards Convert to Performance Support.** After each assessment is successfully completed, the corresponding content cards are saved for anytime reference. Learners can easily access, save, and store content cards using the app's standard performance support design.

The team felt the above design could be a potential "game changer" in terms of how Deloitte designs and administers "compliance learning" — not only in federal but firm-wide. However, this design needed to be tested and measured before it could be scaled to other topics.

As such, the collaborating teams (i.e., compliance, risk, IT, etc.) agreed that the app's design could be deployed to the federal practice for the assessments in 2017 via a "pilot." Specifically, the pilot meant that learners would be given the opportunity to use the app to complete the assessments (using Deloitte-issued phones) — or they could use the previous (2016) platform if desired (launch/take via LMS and leverage PDF study guide where needed).

As noted below, federal talent development created a detailed communication and change management plan aimed at marketing the app as the preferred option and driving adoption. Additionally, various feedback channels were deployed as to collect data on the user's experience and how well professionals performed when using the app as compared to those who completed the assessments via the LMS.

Change Management Efforts

There were many challenges and obstacles faced over the team's journey to design and deploy the app. Obvious examples (given Deloitte's size and complexity) involved coordination among a variety of stakeholders and internal teams needed to help deploy a new mobile solution. There was no special approach to managing these, however, rather it was simply a combination of developing trusted relationships and disciplined project management.

The biggest challenge facing the team in this journey was simply: "How do we make people aware that the app is an option? And that, in fact, it is a far better option than the 2016 platform (LMS + PDF study guide)."

At the time, the number of people working on federal projects who would be required to take these assessments was approximately 10,000. Assuming 60% to 70% of that population had a Deloitte-issued mobile device, 6,000 to 7,000 users would represent the company's target (i.e., 100% percent adoption of the app).

To market the app to this audience, the following tactics were deployed:

- **Leadership Messaging:** An initial launch message from practice leadership, coupled with recurring reminder communications from federal talent development during the pilot period (September 2017 to December 2017).

- **An App Webpage**: The creation of a dedicated page on Deloitte's intranet site. The site provided an overview of the app's functionality and benefits, as well as detailed download and troubleshooting instructions.

- **Compliance Emails/Alerts:** Recurring and automated reminders from Deloitte's My Compliance Dashboard tool which routed learners to the dedicated webpage (vs. the assessment links in the LMS).

- **Office Signage**: Both digital and hard copy which marketed the app were placed in strategic/high-traffic locations in Deloitte's federal practice home office.

- **Push Notifications and Texts:** In-app alert capabilities which pushed messaging to professionals who had already downloaded the app (encouraging them to spread the word about the app to others).

- **Sweepstakes and Contests:** Various activities during the pilot which recognized those who completed one more assessment in the app, as well as encouraged other users to download it.

The tactics above were used strategically throughout the pilot period to optimize the team's reach. When the pilot concluded in December 2017, over 3,500 professionals had downloaded the app and completed one or more assessments (nearly a 50% adoption rate).

Measurable Benefits

As noted above, the journey to design and deploy the app sought to address some key business and performance objectives. Below is a summary of how the app satisfied or materially improved each of these.

1. **Comply with Government Requirements:** The team worked closely with the federal compliance and risk leadership to ensure this format would be acceptable to the government. Not only was the format acceptable, but multiple members of the government with whom Deloitte interacts were given a demo of the app and commented that it was one of the most innovative and impressive compliance solutions they had seen.

2. **Minimize Business Disruption:** User feedback clearly noted that the app made a difference here. The team recorded several dozen examples of learners completing their assessments "on the go" during non-client facing time/time that would have otherwise been unproductive. Specific examples include:

   o During a meal break.

   o Commuting on a train.

   o Waiting to board an airplane.

While financial impact data was difficult to calculate during the pilot phase, it is estimated that over 3,500 practitioners saved an average of between one to two hours of time out of market due to the app. Using a conservative average billing rate of $150/hour, this

provided the practice the opportunity to potentially earn $500,000 to $1 million in additional revenue during the FY18 pilot. When the app is leveraged by the entire (12,000-person) practice in FY19, the financial impact could potentially be up to $1.8 million.

3. **Drive Learning & Performance (Around Compliance Behavior):** As these assessments were deployed in September through December 2017, year-over-year analysis of practice compliance performance data has not yet been completed as of this writing. However, when comparing the initial assessment data between the two platforms (the app vs LMS), there were several favorable findings:

    o On average, app users completed the assessments in fewer attempts than LMS users (attributed to the "remediation/crediting correct answers" in the app's design).

    o On average, app users achieved higher passing scores than LMS users (attributed to the "Improve My Score" feature in the app's design).

4. **Make It Easy to Use and Fun:** To measure the user experience, the team deployed a simple survey within the app. Upon completing the survey, users also were invited to rate the app and comment on the Deloitte app center (and/or send an email to the federal talent development team). Below are some key results of these activities.

    • Nearly 1,000 users completed the in-app survey:

        o 94% strongly agree/agree the app is preferred over an LMS platform.

        o 90% strongly agree/agree they would use the app for on-the-job performance support (for both compliance and other topics).

    • Nearly 500 users rated the app and/or commented on the Deloitte app center/email:

        o The app received a 4.8/5 rating on the Deloitte app center.

        o Examples of comments received included:

- **Consulting Leader**: "Love the app — I've been telling everyone I know to download the app as it was that much of a game changer for me."

- **Consulting Leader**: "The app is probably my favorite Deloitte innovation in recent memory."

- **Consulting Senior Consultant**: "This has been a fantastic way to complete what used to be painfully slow and tedious trainings! Would be great to leverage this platform for other assessments."

- **Consulting Manager**: "This makes compliance training simple and helps enforce knowledge efficiently. Great app!"

Overall

Based on the initial assessment results, user feedback and stakeholder satisfaction, it was clear the pilot had been successful. Given this, the federal talent development team began efforts to address lessons learned and set a strategy for how the app could be used more broadly. These details are noted below.

Learner Adoption of Mobile Technology

- **Lesson Learned**: While having 3,500 users was unquestionably successful, the team recognized that not everyone prefers to complete such activities on a mobile device (or has a Deloitte-issued device for that matter).

- **Next Steps**: Given the above, the team is working with the Developer to create a web-based version which mirrors the app and can be accessed via desk/laptop. Having this web-version will enable Deloitte to retire the LMS format and offer the new tool as the only platform for this annual learning requirement beginning June 2018.

Data Integration with Deloitte's LMS

- **Lesson Learned**: Given this was a pilot, work was not done to integrate the app completion records with Deloitte's LMS. Rather, data was updated manually and often not reflected in a learner's records for several days (or even weeks) after a completion. This was virtually the only negative feedback learners provided on the app as learners expected to see their LMS credit (learning hours and CPE) recorded in a much more expeditious manner.

- **Next Steps**: Given the above, the team is working with the developer and Deloitte's LMS leads to automate the data transfer between the app and the LMS. This will eliminate the need for manual data entry and provide leaners with updated/accurate completion history in a timely manner.

Leveraging the App for Other Content and Learning Programs

- **Lesson Learned**: There is heavy interest in the Deloitte's development community and business leadership in identifying and deploying new and innovative solutions to engage learners. Many people across these various channels had their eye on the pilot and expressed interest in using the app once the pilot concluded.

- **Next Steps**: Federal talent development not only is driving at the steps above to leverage the app for compliance in 2018, but the team also is planning to use it as the primary platform for deploying federal specific onboarding content to new hires. This includes content on the federal practice structure, leadership, key talent topics (performance management, inclusion, well-being and learning and development) and, of course, compliance.

Further, there are projects now under way to populate the app with content applicable to a cross-industry, functional and geographical audience. A prime example of this will be the creation of "Tech Savvy" content cards which will consist of 50-plus flash cards capturing key information on disruptive technologies and trends (i.e., Blockchain) for which everyone in Deloitte across the globe is expected to be "conversationally competent."

Lastly, development leadership responsible for Deloitte-wide compliance-related learning is evaluating whether the app could be used for portions of their national learning portfolio.

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